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

Birth Facility User Guide

Version 1.0

03/30/2018
<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Version of System</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/30/2018</td>
<td>Initial Document</td>
<td>1.0</td>
<td>Valerie Hooven</td>
</tr>
</tbody>
</table>
# TABLE OF CONTENTS

1 ABOUT THE TXEVER BIRTH APPLICATION

1.1 INTENDED AUDIENCE

2 SYSTEM OVERVIEW

2.1 APPLICATION FEATURES

2.1.1 Contact Directory

2.1.2 Internal Messaging

2.1.3 Help Features

2.2 TECHNICAL SUPPORT RESOURCES

2.2.1 TxEVER Help Desk Technical Support

2.3 LOGIN SYSTEM ACCESS

2.3.1 Session Timeouts

2.3.2 About Passwords

2.3.3 Logout/Exit the System

2.4 BIRTH DASHBOARD

2.5 NAVIGATION, DATA ENTRY AND TOOL TIPS

2.5.1 Using the Mouse

2.5.2 Using the Keyboard

2.5.3 Using Tool Tips

2.5.4 Using Internal Messaging

2.5.5 Visual Cueing (Viz-e-Q®)

2.5.6 Edit Checks (Fast-Fire®)

2.5.7 Status Bar

2.6 CERTIFIER/ATTENDANT LIBRARY MAINTENANCE

2.6.1 Certifier/Attendant Profile

2.6.2 Certifier/Attendant Grid

2.6.3 Adding a Certifier/Attendant from Library Maintenance

3 BIRTH REGISTRATION DATA ENTRY AND CERTIFICATION FUNCTIONS

3.1 START AND SAVE A NEW RECORD

3.2 SEARCH FOR A RECORD

3.2.1 Search Screen

3.2.2 Work Queue Search

3.3 CANCEL CHANGES

3.4 UPDATE A RECORD

Page | 3
3.5 ABANDON A RECORD ........................................................................................................39
3.6 RETURN TO THE MAIN MENU ..........................................................................................40
3.7 USING THE UNRESOLVED FIELDS LIST ..........................................................................40
3.8 BIRTH REGISTRATION DATA ENTRY TOPICS ..................................................................41
  3.8.1 Double Data Entry ........................................................................................................41
  3.8.2 Pick List Navigation ......................................................................................................42
  3.8.3 Zip Code Functionality ..................................................................................................43
  3.8.4 Add on the Fly ................................................................................................................43
  3.8.5 Screen Tab Navigation ..................................................................................................44
  3.8.6 Place of Birth Facility ...................................................................................................44
3.9 ETHNICITY AND RACE FIELDS PROPERTIES .................................................................44
3.10 TECHNICAL BIRTH REGISTRATION DATA ENTRY TIPS ...............................................45
  3.10.1 Newborn Tab ...............................................................................................................45
  3.10.2 Mother Tab ..................................................................................................................46
  3.10.3 Intended Mother Tab ..................................................................................................47
  3.10.4 Mother Medical-1 Tab ...............................................................................................47
  3.10.5 Mother Medical-2 Tab ...............................................................................................48
  3.10.6 Mother Medical-3 Tab ...............................................................................................50
  3.10.7 Mother Medical-4 Tab ...............................................................................................50
  3.10.8 Newborn Medical-1 Tab ............................................................................................51
  3.10.9 Newborn Medical-2 Tab ............................................................................................52
  3.10.10 Certification Tab .......................................................................................................52
3.11 CAPTURING SIGNATURES ..............................................................................................54
  3.11.1 Capture Acknowledgment of Paternity Signatures .......................................................54
  3.11.2 Capture Denial of Paternity Signatures ......................................................................60
3.12 CAPTURE VERIFICATION OF BIRTH FACTS SIGNATURES .........................................66
  3.12.1 Capture Verification of Birth Facts Signatures Using Mouse .........................................66
  3.12.2 Capture Verification of Birth Facts Signatures Using USB Signature Pad .....................67
  3.12.3 Capture Verification of Birth Facts Signatures Using Form Upload ................................69
3.13 VIEW SIGNATURES .........................................................................................................70
  3.13.1 View Acknowledgment of Paternity Signatures ...........................................................70
  3.13.2 View Denial of Paternity Signatures ...........................................................................71
3.14 VIEW SIGNATURE HISTORY ..........................................................................................72
3.15 SEARCH AOP RECORD ....................................................................................................73
  3.15.1 Link AOP to Birth Record ............................................................................................74
  3.15.2 De-link AOP from Birth Record ..................................................................................75
3.16 PRINTING FORMS ............................................................................................................78
3.16.1 Print/Re-print Birth Worksheet ................................................................. 78
3.16.2 Print Verification of Birth Facts ................................................................. 78
3.16.3 Print Acknowledgment of Paternity Form .................................................. 79
3.17 Download State Uploaded AOP Forms ......................................................... 79
3.18 Electronic Certification ................................................................................... 80
3.18.1 Performing Electronic Certification ............................................................. 80
3.18.2 De-Certifying a Record .............................................................................. 82
3.19 Generating Reports ....................................................................................... 83
3.19.1 Birth Institution Registration and Timeliness Audit Report ......................... 83
3.19.2 Birth Records Released But Pending AOP Report ...................................... 84
3.19.3 Certified by Certifier Report ...................................................................... 84
3.19.4 Facility Productivity Report ...................................................................... 85
3.19.5 Hospital AOP Report ............................................................................... 86
3.19.6 Listing of Unmatched Births with High Probability of Death Report .......... 86
3.19.7 Multiple Birth Exception Report ............................................................... 87
3.19.8 Multiple Birth Report .............................................................................. 88
3.19.9 Record Status Report ............................................................................... 88
3.19.10 Rejected Records Report ........................................................................ 89
3.19.11 Uncertified by Certifier Report ................................................................. 90
3.19.12 Unresolved Record Report ..................................................................... 91
3.19.13 User Status and Case Related Activity Report ......................................... 91
3.20 Release a Record ......................................................................................... 92
3.20.1 Release of a High Risk Record .................................................................. 92
3.20.2 Release of a Record with an Associated AOP ........................................... 94

4 FACILITY STATISTICAL CORRECTION ...................................................... 95
4.1 Start a Facility Statistical Correction ............................................................... 95
4.1.1 Scan Supporting Documentation ............................................................... 97
4.1.2 Upload Supporting Documentation .............................................................. 98
4.2 Submit a Facility Statistical Correction .......................................................... 100
4.3 Cancel a Facility Statistical Correction .......................................................... 101
4.4 View Corrections ......................................................................................... 101
4.5 Reject Facility Statistical Correction ............................................................. 102

5 PRE/POST BIRTH AOP REGISTRATION ................................................... 104
5.1 Start and Save a New AOP .......................................................................... 104
5.2 Search for a Record .................................................................................... 106
5.2.1 Search Screen ......................................................................................... 106
5.2.2 Work Queue Search ................................................................................ 107
Important Terms

**Acknowledgement of Paternity**: A form completed by the parents of the child to verify the father of the child.

**Add on the Fly**: The process of adding an attendant or certifier who is currently not in the electronic registration system. The process allows the birth clerk to enter the data about the certifier or attendant and certify a record without having to wait for the state to validate the newly added information. The newly added information is either added as new or validated as an existing record as a back office function.

**APGAR Score**: An initialism that stands for “Appearance, Pulse, Grimace, Activity, and Respiration.” This score (from zero 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 parents who delivered a newborn outside of a facility (such as a home birth). The birth worksheet is completed by the parents and then verified by a facility.

**Breech Birth**: When a baby exits the pelvis with the feet or buttocks first instead of the normal head-first presentation.

**Cephalic Birth**: 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 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 data entry field in the application with pre-determined values that are pulled from a database.

**PHI**: Protected health information

**Releasing a Record**: The action that queues a resolved, certified record to a Review or for batch registration

**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 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 that shows unresolved fields that need resolved before certification can occur.

**Visual Cueing**: A feature 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 USDAs 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.
1 About the TxEVER Birth Application
The Texas Electronic Vital Events Registrar (TxEVER) system improves timeliness and accuracy of event registration in Texas.

1.1 Intended Audience
This user guide is for facility users who use the Web-Enabled Electronic Birth Registration System to create and process birth records for the State of Texas.

A facility user is a professional typically associated with a single hospital/birthing institution. Facility users are the largest user group and can include birth clerks, nurses, midwives and medical certifiers (including physicians). The facility user will be responsible for, among other things, entering data onto the birth record from the birth facility (hospital, birthing center, etc.).

Facility users will also be responsible for making corrections to statistical fields on registered records if there is a potential error identified in an NCHS query report, or by CHS statistical reviewers. Potential statistical corrections will be reviewed and completed from a separate work queue and records re-submitted to the State for review.

Additionally, facility users will have the capability to create new AOP records, acquire signatures and link AOP records to birth records. This will be completed through the Pre/Post Birth AOP Registration screen.
2 System Overview

2.1 Application Features

2.1.1 Contact Directory
A contact directory will be available in the system for users to access and search for other users in the system directly. Stakeholders will be able to view other Facility and Local stakeholders information.

The directory will be contingent upon the inclusion of each user’s email and contact information, collected and created at the time of User Maintenance. Users have the option to update this information and preferred contact via the Update My Profile menu option.

2.1.2 Internal Messaging
The internal messaging capability will allow users to send messages back and forth within the system. A visible icon, located at the top right hand corner of the screen will indicate a new message has been received. The unread notification will appear in the UI until the user reads the unread message.

At any point a particular participant’s action is required on a record, that participant shall be notified automatically through a system generated email. The message will include a brief description of the action that needs to be taken.

Messages can also be sent between system users for any other reason. Users will be able to look up the user ID of another user to send a message. A brief message history will be viewable to the user.

2.1.3 Help Features
The following resources provide reliable ways to get answers to questions and support for all of the functionalities included in the Birth module:

- Field Level Help
- Module Level Help
- System Level Help
- About TxEVER Birth Application
- Help Desk Ticket

2.1.3.1 Field Level Help
Field Level Help provides specific help information related to the field in focus which is displayed in the Field Level Help frame between the data entry tabs and the data entry screen. The content in the Field Level Help frame can be configured in Screen Configuration by a system administrator.
2.1.3.2 System Level Help
System Level Help provides a searchable help index with various help topics of interest pertaining to the functions and processes available within the TxEVER system. Select the Birth /Help/Help menu item to access System Level Help.

2.1.3.3 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 Birth/Help/About menu item.

2.1.3.4 Help Desk Ticket
The system allows users to send a help desk ticket directly to the DSHS Center of Excellence through a menu item. The Help Desk email address will automatically populate the standard pre-defined recipient and message based on the context of the ticket. It will be a no-reply sender. Users will have limited character space to describe the issue and will be identified automatically by name and user ID. If the user sends a help desk ticket within an open record, the email will be automatically populated with the record ID number and location of the user at the time of help desk ticket creation. This email will have a subject of the record ID number (EBR). This information will not include protected health information (PHI). All help desk tickets are logged and tracked.

2.2 Technical Support Resources
2.2.1 TxEVER Help Desk Technical Support
The TxEVER DSHS Center of Excellence help desk is the main source of technical support for users of the TxEVER Birth module. Users will be able to send a help desk ticket from the interface. When the user selects the Help Desk Ticket menu option, the Center of Excellence email address will prepopulate the message with a no-reply sender.

There will be limited characters to describe the issue and the initiating user will be stamped on the ticket. If the user initiates a ticket within a record, the record number will populate the subject line. The time and location will be stamped on the ticket also. No personal health information (PHI) will be included in the
ticket.

In order to report an issue to the Help Desk, click the **Help/Contact Helpdesk** menu item.

---

*Figure 2: TxEVER Splash Page*
2.3 Login System Access

Prior to making any attempts to access the TxEVER system, the user needs to verify that they have access to the following requirements:

- 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 CSV flat files and for accessing/running reports

If one or more requirements are missing, the TxEVER Birth application will not be accessible and/or will not function properly. Follow the instructions below after verifying that all technical requirements are met, as specified above.

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

7. Enter in a user name and password and click the Log In button.
8. The Select Location window will be displayed.
Figure 6: 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:

![TxEVER Home Page](image)

**Figure 7: 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.
2.3.1 Session Timeouts

If the system has not detected action within 20 minutes, the session will timeout and the user will not receive further responses from the system. No unsaved work will be automatically saved in the case of a time-out. Two minutes prior to a session timeout, the system will issue the following warning message:

![Figure 8: Timeout Warning Message](image)

If the system appears to stop responding (i.e., no choices in some pick lists, cannot save a record, cannot retrieve a record, etc.) it is likely that a session time-out has occurred and the following message will alert the user of session timeout:

![Figure 9: Timeout Message](image)

To recover from a session time-out, exit and re-login to start a new session. Users should save their work frequently to prevent session time-outs.

2.3.2 About Passwords

Users are assigned a temporary password at the time they sign up for use of the application. The temporary password must be changed upon the user’s first login into the system. At the time of a user’s first login into the application, the following screen will appear:
The new password must meet all of the following criteria:

- Number of password attempts before being locked out
- Time between password attempts required for reset-time
- Number of days until required password reset
- Specific special character inclusion
- Numeric character inclusion
- Uppercase and lowercase character inclusion
- Number of character minimum

The system defaults to the password criteria listed above, but a system administrator can change the password settings at any time. If a user’s new password does not meet the criteria, the following message will appear:
Passwords expire after 90 days. When this happens, the user will be alerted when an attempt is made to login with an old password.

If a user attempts to log on but fails to successfully enter their password, after a DSHS configurable number of unsuccessful login attempts, the user will be locked out of their account. An authorized State user will be able to unlock a user’s account that has been locked due to consecutive invalid login attempts. A user may also request a new temporary password in the event that they forget their existing password by clicking the **Forgot Password** button located on the **Login** screen.

### 2.3.3 Logout/Exit the System

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

1. From the Main Menu, select the **Function/Exit Application** menu item to logout

   **OR**

2. Click the **Log Out** button.

   **Note:** Although closing the browser by clicking on the [X] (close window option) located in the upper right corner of the screen will close the application, it is recommended that the user exit by using the **Logout** icon or the **Exit Application** menu option instead. This will ensure that the users session is also closed and prevent possible problems when the user tries to login again.
2.4 Birth Dashboard

From the Birth Home screen, users may access the Birth Dashboard by clicking on the Show Dashboard button, as pictured in the above screenshot. The Birth Dashboard provides a summary of all pending birth records for the login location in the TxEVER Birth Module.

![Figure 13: Birth Dashboard](image-url)
Users may select a value from the **Dashboard Filters** drop-down list (pictured in the above screenshot) to filter the grid of pending records to include only those records that meet certain criteria.

### 2.5 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 for maneuvering the system.

#### 2.5.1 Using the Mouse

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

#### 2.5.2 Using the Keyboard

The following keys allow for easy navigation through the screens in the TxEVER Birth application without using the mouse:

- **Tab Key:** Moves cursor from one field to another. When a field is selected, the field will be highlighted with a green background, blue background, and in some cases, a frame will form around the selected field to aid the user.
- **Shift + Tab:** Reverses the tab order and moves focus back to the previous control.
- **Enter:** Initiates the action selected. Pressing **Enter** is equivalent to double-clicking the mouse.
- **Left/Right/Up/Down Arrows:** Used to navigate within a field or within a pick list. The **PgUp** and **PgDn** keys may also be used.
- **Down Arrow for Dropdown Box:** Pressing the **Down Arrow** key in a selected drop-down box will reveal available selections in a list form. Use the **Up** or **Down** arrows to scroll through the list.
- **Type-ahead Logic:** Type-ahead logic provides another way to save time by eliminating the number of keystrokes to pull up an item from a drop-down box. This feature enables the user to begin typing and the list will filter according to what the user types.
- **Space Bar:** Used to toggle a check box item on or off.

#### 2.5.3 Using Tool Tips

Tool tips display information revealing an icon’s function. To view a tool tip, hover the mouse cursor over an icon.
2.5.4 Using Internal Messaging

Messages can be sent to any user on the system using the internal messaging functionality. The user can send a message by selecting the Send/Check New Messages icon. The Web Messaging screen will appear, where the user can search for a select a user in the system. The message has a limited amount of characters and will appear to the recipient as a icon in the top right-hand corner.

Figure 14: Web Messaging Screen

The unread message notification will appear on the display for the recipient of a message until they open/read the message. A brief history of their messages will be available to the user.

2.5.5 Visual Cueing (Viz-e-Q©)

The Visual Cueing feature of the TxEVER Birth module provides users with color-coded field cues to indicate the status of each data field. Users have the ability to change colors as per their own preferences using the User Parameters settings under the Birth/Tools/Utilities/User Parameters menu item.
2.5.6 Edit Checks (Fast-Fire©)

2.5.6.1 Soft Edit
According to the 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.”

An example of a soft edit in the *Birth* module involves the mother’s education. If the mother’s documented level of education does not coincide with her calculated age, the application will query the user as shown below:
1. If the user alters one or more of the values so that the mother’s documented level of education coincides with her calculated age and presses **OK**, the screen disappears and the fields become resolved.

If the user does not alter any of the values and presses **OK**, the following message appears:

![Crosscheck Alert Message](image)

**Figure 17: Crosscheck Alert Message**

2. If the user selects **No**, the soft edit will not be resolved and the user will return to the crosscheck window.

If the user selects **Yes**, the soft edit becomes resolved and the values in all crosscheck fields become resolved.

### 2.5.6.2 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:

![Alert Message](image)

**Figure 18: Hard Edit Message**

### 2.5.7 Status Bar

The **Status** bar will appear at the bottom left corner of the Birth Data Entry Registration screen in the TxEVER Birth module. Information appearing on the **Status** 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/Unresolved).

**Current Action**: Displays the action that is currently being performed on the record.
2.6 Certifier/Attendant Library Maintenance

In the TxEVER application, one or more of the users at a facility may be assigned local administrator privileges. These local administrator privileges allow users to complete all birth registration data entry processes, plus additional administrative processes such as User Maintenance and Library Maintenance for their particular locations.

Library Maintenance tables provide the capability for a management level user at a facility to maintain library tables used during data entry as pick lists. Library tables serve to reduce data entry time by automatically filling in associated information. The ability to add, update, search and view listings of the Library Maintenance tables is based on a user’s security privileges.

The Certifier/Attendant Maintenance process accommodates adding new Attendants/Certifiers for facilities. The Certifier/Attendant information is used to complete the electronic certification component of the birth record. The Certifier/Attendant for the record is specified from the Certifier and/or Attendant list found on the Certification tab of the Birth Registration screen.

The Certifier/Attendant Maintenance window consists of the following frames:

- Certifier/Attendant Profile
- Certifier/Attendant Grid
2.6.1 Certifier/Attendant Profile

The Certifier/Attendant profile includes relevant information about a person acting in the capacity of a Certifier/Attendant.

When adding an Attendant profile, enter the following information:

- Name (first and last are mandatory)
- Address (street number, street name, street type, state, county, city/town, and zip are mandatory)
- Title
- To Email
- CC Email
- Fax Number
- Display in Lists drop-down menu (mandatory)

The Display in Lists drop-down menu provides the option to have the table entry displayed as a choice in the pick list as an available option during data entry. The Display in Lists drop-down is useful in those cases when an entry added to a
library table may only apply to a single record.

**Note:** When an entry is added or modified in a library table, a duplicate check is performed. If a duplicate entry is detected during the **Save** or **Update** process, the user will be notified that a matching entry already exists and be prevented from adding or updating the entry.

### 2.6.2 Certifier/Attendant Grid

The **Certifier/Attendant** grid displays a list of Certifiers/Attendants that are associated with the current location. To view a specific attendant’s or certifier’s profile, click the profile listing.

The **Attendant Maintenance Library Table** grid is initially blank. Each local administrator will create a list of available Certifiers/Attendants associated with their location that will appear on the grid. Once the library table information is entered, the information will populate the available pick lists for selection.

### 2.6.3 Adding a Certifier/Attendant from Library Maintenance

If a user wants to add a Certifier/Attendant to their locations profile, they must complete the following steps:

1. Select the **Birth/Tools/Library Maintenance/Attendant** menu item to load the **Attendant Library Maintenance** screen.

2. Enter the appropriate information for the entry.

3. To display in lists used during data entry, check **Display in Lists**.

4. Click **Save**.

**Note:** Attendants/Certifiers can also be added through the use of the **Add on the Fly** feature described in **Add on the Fly**.
3 Birth Registration Data Entry and Certification Functions

This section provides detailed information about the TxEVER Birth application regarding functions related to Birth Registration Data Entry and Certification that allow completion of the birth certificate.

3.1 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 or Birth/Function/Midwife Registration item to initiate a new birth record.

If there are any records in the Late Records work queue, the application will issue a message alerting the user to the presence of these late records as shown below.

![Figure 21: Late Records Message](image_url)

The initial Birth Registration screen will appear.
2. 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.

3. Enter all available information about the birth event into the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Type</td>
<td>Select a record type from the dropdown list</td>
</tr>
<tr>
<td>Plurality</td>
<td>Select the number of children delivered</td>
</tr>
<tr>
<td>Newborn’s Last Name</td>
<td>Enter Text</td>
</tr>
<tr>
<td>Newborn’s Date of Birth</td>
<td>Enter Date</td>
</tr>
<tr>
<td>Time of Birth</td>
<td>Enter Time</td>
</tr>
<tr>
<td>Mother’s Last Name</td>
<td>Enter Text</td>
</tr>
<tr>
<td>Mother’s Medical Record Number</td>
<td>Enter text</td>
</tr>
</tbody>
</table>
4. Minimally, the user must enter values into all fields listed above and select the 
   Record/Save menu item, or click the Save icon.

   The system will display the following message:

   ![Record Creation Confirmation Message]

   **Figure 23: Record Creation Confirmation Message**

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

   If the user selects Yes, the application will perform a search for potential duplicate 
   records without notifying the user.

6. If a match is not found, the following message will appear:

   ![Record Successfully Created Message]

   **Figure 24: Record Successfully Created Message**

   Click OK to proceed with birth registration data entry on a new record.

7. If a match is found, the following message will appear:

   ![Duplicate Record Message]

   **Figure 25: Duplicate Record Message**

   If multiple potential matches are found, the application will display a grid of the 
   potential duplicate records.
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. The user may open a record (based on access rights) to review it further by selecting it from the grid and clicking **Select**. If a user attempts to select a record owned by another facility, a message alerting the user to this will appear.

ii. Continue with the creation of the new record by pressing **Continue to save record**. The record will still be flagged as a potential duplicate.

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 **Birth Registration Data Entry Topics** and **Technical Birth Registration Data Entry Tips** for more details on how to complete the record.
3.2 Search for a Record
Searching for a record in the application can be accomplished using the following options:

- Search screen
- Work Queue search

3.2.1 Search Screen
1. Click the Search icon  or select the Record/Search menu item.
   The Search Record screen will appear.

   ![Birth Search Screen]

   Figure 27: Birth Search Screen

2. 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 gender 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 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**.

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

![Birth Record Search Screen with Results](image)

**Figure 28: Birth Record Search Screen with Results**

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

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

6. 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.

### 3.2.2 Work Queue Search

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

- Birth 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 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, as shown below. Options include:

   ![Unresolved Work Queue Filter](image)

   **Figure 29: Unresolved Work Queue Filter**

   - **All Unresolved**: All records that have been started but the information is not yet complete.
   - **Late Records**: All records not certified within the State-defined time period (5 days).
   - **Data Entry Incomplete**: All records on which data entry has not been completed.
   - **Ready for Release**: All records that are ready for release.
   - **Ready for Certification**: All records that have all fields resolved but are still awaiting medical certification.
   - **AOP Pending**: Records on which an AOP is indicated but AOP fields are not yet completed.
   - **Rejected Records**: All records that have been queued back to the facility from the State.
- **Incomplete AOP**: All records that have paternity established under the Mother’s Marital Status but the Date AOP Signed field is still unresolved.

2. From the record list, select the appropriate record by clicking on it, or with the focus on the list, start typing the newborn’s last name (if available).

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.

### 3.3 Cancel Changes

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

1. Retrieve an existing record using the [Work Queue Search](#) 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 31: Save Changes Confirmation Message](image)

---

Page | 36
a. Click **No** to cancel the changes made to the record.

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

### 3.4 Update a Record

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

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

   a. If there are any records in the Late Records Work Queue, the following message will appear:

   ![Figure 32: Late Records Message](image)

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

3. While a record with unsaved changes is on screen, select the Record/Save menu option, or the Save icon.
   The following message will appear:
All previously unsaved changes made to the record will be saved.

4. Proceed with birth registration data entry by completing the information requested on the data entry tabs. See Birth Registration Data Entry Topics and Technical Birth Registration Data Entry Tips for more details on how to complete the record.

3.5 Abandon a Record

Any user can choose to abandon a record up until the record is released and assigned a State File Number (SFN). If a record is registered, the record can be voided in Legal View.

To abandon the record, select Record/Abandon or the Abandon icon 

The following message will appear:

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.
The following message will appear:

![Abandon Record Comment Screen](image1)

**Figure 36: Abandon Record Comment Screen**

The following message will appear:

![Record Abandon Completed Successfully Message](image2)

**Figure 37: Record Abandon Completed Successfully Message**

### 3.6 Return to the Main Menu
Return to the Birth module main menu at any time by selecting the Function/Home menu item.

### 3.7 Using the Unresolved Fields List
Depending on the type of record, a number of actions need to be performed before a record is ready to be submitted for further processing. 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.

The Unresolved Fields list will open.
3. 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.

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

3.8 Birth Registration Data Entry Topics

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 describes the remaining scenarios.

3.8.1 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:

![Double Data Entry Screen](image)

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:
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.

### 3.8.2 Pick List Navigation

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

1. Set focus on the **State/Country** field by clicking on the field. Type the letters TE or any other beginning letters of another state.
   - 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 County and City/Town pick-lists as well.
2. With focus still on the **State/Country** field, click the checkbox. The pick-list will now contain both states and countries.
3.8.3 Zip Code Functionality
Set focus on the Zip field in the Mother’s Residence Address section of the Mother tab and enter a zip code. Tab out of the field and the following fields will auto-populate:

- State/Country
- County
- City/Town

3.8.4 Add on the Fly
When an Attendant/Certifier is not in the list even though it is a valid entry, it can be added. This is referred to as Add on the Fly (AOF). It allows the user to add an item that is not in the list when necessary. The state will ultimately validate the new entry. To access AOF:

1. Open the list by clicking on the arrow button or setting focus on the field and pressing the Down Arrow key.

2. Scroll down to the bottom of the list. The very last option in lists that will allow Add on the Fly is a choice (… Add New …).

The AOF – Attendant screen will appear.
3. Complete the required data entry fields for the new entry. If the user believes that their new entry may be frequently used, select **Display in Lists**.

4. Click **OK** to save the new entry.

### 3.8.5 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 **Next** button at the bottom of the screen and the user can press **Enter** on the keyboard to load the **Mother** tab. The user can also navigate to various screen tabs by clicking on them with a mouse.

### 3.8.6 Place of Birth Facility

Once a facility is selected, the address fields for a listed birth facility are automatically populated. These types of fields are retrieved from the database and are referred to as bypassed and disabled. The address information of a given facility cannot be directly edited on the screen.

### 3.9 Ethnicity and Race Fields Properties

Ethnicity allows selecting one choice from the available options.

- To change the choice, first un-check the selected choice.
Race fields allow multiple choices.

Race check box fields can also be selected and de-selected using the mouse or the keyboard. Use the Tab key and the Shift+Tab key to navigate to the desired choices and the Spacebar or the mouse to select or de-select.

3.10 Technical Birth Registration Data Entry Tips

3.10.1 Newborn Tab

3.10.1.1 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 or Conjoined.
3.10.1.2 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.

3.10.1.3 Time of Birth
After entering a time of birth under Newborn’s Information, the AM/PM field will become enabled. This field must be resolved before the record can be saved for the first time. It is important to note that the AM/PM field will become locked and show Military.

3.10.2 Mother Tab

3.10.2.1 Date AOP Signed
The Date AOP Signed field will become enabled only if paternity is identified in the Marital Status field.
3.10.3 Intended Mother Tab

The **Intended Mother** tab will only appear if the **Court Ordered Surrogacy** record type is selected in the **Newborn** tab.

![Intended Mother Tab](image)

Figure 47: Intended Mother Tab

3.10.4 Mother Medical-1 Tab

3.10.4.1 Mother’s Transfer Status

If the user indicates the mother was transferred for delivery, the **If YES, from what location** field will become enabled. Click the arrow and select the facility the mother was transferred from or click the **Search** icon beside the field to search for a specific facility.

3.10.4.2 Cigarettes Information

If the user selects **Yes** in the **Did mother smoke cigarettes before or during pregnancy?** dropdown field in the **Cigarettes Information** section, the fields concerning the number of cigarettes and packs throughout different stages of the pregnancy will become enabled. Selecting the ‘Did Mother report in Packs?’ or ‘Did mother report in Cigarettes?’ field will cause the fields in the “# of Cigarettes per day” or ‘# of Packs per day’ section to be enabled.
3.10.5 Mother Medical-2 Tab

3.10.5.1 Pregnancy History

If the user places a value in the **Number of previous live births now living** field in the **Pregnancy History** section, the **Date of last live birth** field becomes enabled. Additionally, if the user places a value in the **Number of other pregnancy outcome** field, the **Date of last other pregnancy outcome** field becomes enabled.

3.10.5.2 Prenatal Information

If the user indicates the mother received prenatal care in the **Prenatal Information** section, the remaining fields will become enabled. If the mother did not receive prenatal care or it is unknown if the mother receive prenatal care, all fields will remain disabled.
3.10.5.3 Method of Delivery

The following fields always need to be completed in this section:

- Was delivery with forceps attempted but unsuccessful?
- Was delivery with vacuum extract attempted by 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. These processes are shown below.
3.10.6 Mother Medical-3 Tab
At least one box needs to be checked in the Infections Present And/Or Treated During this 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.

Figure 52: Mother Medical 3 Tab

3.10.7 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 sections. 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.
3.10.8 Newborn Medical-1 Tab

3.10.8.1 General Information

3.10.8.1.1 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.
3.10.8.1.2 Transferred Infant
If the user indicates the infant was transferred within 24 hours of delivery, the If yes, where field will become enabled. Click the drop-down arrow and pick the facility or click the Search icon beside the field to search for a specific facility.

3.10.9 Newborn Medical-2 Tab
At least one box needs to be checked in the Abnormal Conditions and Congenital Anomalies sections. 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.

![Abnormal Conditions and Congenital Anomalies](image)

Figure 55: Newborn Medical 2 Tab

3.10.10 Certification Tab
Refer to Add on the Fly for technical information on the Attendant Information and Certifier Information sections on the Certification tab.
3.10.10.1 Record Comments

Some events require a corresponding comment. These comments are stored and can be viewed in a grid on the Comments tab:

The following information regarding each comment will be stored:

- Action that required the comment
- The facility user logged in when the comment was entered
- Date and time the comment was entered
- Text of the comment (600 characters)

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

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

3.11.1.1 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:

![Figure 56: AOP Declaration Message](image)

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:
6. Click the Mouse Pad tab on the AOP Signature screen.

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

8. Click the Save Signature button.

9. The system will display the following message:
3.11.1.2 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:

![Figure 59: AOP Declaration Message](image)

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:
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:
3.11.1.3 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:

![AOP Declaration Message](image)

Figure 62: AOP Declaration 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:
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:

![Signature](image_url)

**Figure 56: AOP Signature Screen-Upload Tab**

**Figure 64: Document Upload Confirmation Message**
3.11.2 Capture Denial of Paternity Signatures
The application provides facility users the ability to capture Denial of Paternity signatures using one of three available methods:

3.11.2.1 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:

![Figure 65: DOP Declaration Message](image)

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:
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:
3.11.2.2 *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:

![Figure 68: DOP Declaration Message](image)

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 DOP Signature screen will appear. Click the USB Pad tab on the DOP Signature screen:
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:
3.11.2.3 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 71: DOP Declaration Message](image)

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.

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:
3.12 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:

3.12.1 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 74: Verification of Birth Facts Signature Screen-Mouse Pad Tab](image)

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:

![Signature Save Confirmation Message](image)

Figure 75: Signature Save Confirmation Message

3.12.2 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:
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:
3.12.3 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:

![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:

![Signature dialog box]

Figure 79: Document Upload Confirmation Message

3.13 View Signatures

3.13.1 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:
3.13.2 View Denial of Paternity Signatures
The application provides facility 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:
3.14 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:
3.15 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:

4. Click the **Search** button.
5. Matching partial AOPs will be populated in the search results grid.
3.15.1 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 84: Record Link Confirmation Message](image)

   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 85: AOP Discrepancy Screen](image)

   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.

   b) 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.
c) 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 are 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:

   ![AOP-Partial Record Screen](image)

   **Figure 86: 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?)**

3.15.2 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:

![Record Delink Confirmation Message](image)

**Figure 87: 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:

   ![Scan/Upload Supporting Document Confirmation Message](image1)

   **Figure 88: Scan/Upload Supporting Document Confirmation Message**

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

6. The following screen will appear:

   ![Scan/Upload Document Screen](image2)

   **Figure 89: Scan/Upload Document Screen**

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

   ![Scan Document Window](image3)
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**.
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.

### 3.16 Printing Forms

#### 3.16.1 Print/Re-print Birth Worksheet

The application provides facility users the ability to generate a **Birth** worksheet or **Blank Birth** worksheet after the record is initially saved and throughout the entire registration process.

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

2. Select the **Record/Print/Birth Worksheet** or **Record/Print/Blank Birth Worksheet** menu option.

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

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

5. 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** application.

#### 3.16.2 Print Verification of Birth Facts

The application provides facility users the ability to generate a verification of birth facts after all fields are resolved on the **Birth Registration Data Entry** screen.

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

2. Select the **Record/Print/Verification of Birth Facts** menu option.
3. The application will open the PDF version of the form that allows printing.

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

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

### 3.16.3 Print Acknowledgment of Paternity Form

The application provides facility users the ability to generate a pre-populated **Acknowledgment of Paternity** form after paternity is established on the record and all AOP fields are completed on the record.

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

2. Select the **Record/Print/Acknowledgment of Paternity** 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 prints, close the PDF browser window using the **X** in the upper right corner of the screen to return to the TxEVER application.

### 3.17 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.
5. Click the **Download** link or the **View** icon for the file to open it in PDF for viewing/downloading.

### 3.18 Electronic Certification

#### 3.18.1 Performing Electronic Certification

Electronic Certification is the process provided as a means to electronically sign a birth record after the review of values of data items on the birth record. Certification is required before a record can be released and registered.

Before electronic certification can be successfully performed, **Birth Registration Data Entry** must be completed. Check for unresolved data fields before certifying a record.

1. Search for the desired record using the **Work Queue Search** by setting the unresolved work queue filter to **Pending Certification**.

**OR**

By using the **Search Screen** method by clicking **Search** or selecting **Record/ Search**.

2. Select a record from the **Work Queue** drop-down list or from the **Search** screen grid.

3. When the appropriate record appears on the screen, select the **Record/Certification** menu item to initiate the electronic certification process.

The **Electronic Certification** screen will display the following information:

- Newborn’s Information: Newborn’s Name (First, Middle, Last, Suffix)
- Birth Information: Date of Birth, Gender, Place of Birth
- Certifier Information: First Name, Middle Name, Last Name

![Certification Screen](image)

**Figure 93: Certification Screen**

4. Review the information to ensure that the correct record is being electronically verified.

5. Click **Certification** if all data items are correct.
   
   a. To view a preview of a **Birth Worksheet** for the record, click **Preview** to load a new browser window containing the **Birth Worksheet** in PDF format. The **Birth Worksheet** from this screen can be printed from this screen.
   
   b. If data items are not correct and need to be edited, click **Cancel** to correct the information on the **Birth Registration Data Entry** screen. Save the corrections made to the record and return to Step 1 instructions above to reinitiate electronic certification.

6. If the record is complete, the system will display the following message: “*I verify that a live birth occurred at the location, date and time indicated on this birth record.*”
7. Check the box, enter your PIN and click **OK** to complete electronic certification.

If the correct PIN has been entered, the following message will appear:

![Figure 95: Record Successfully Certified Message](image)

8. Click **OK** to close the **Electronic Certification** screen.

Once a record has been certified it is locked from further changes by the facility user.

### 3.18.2 De-Certifying a Record

The record will become de-certified if the certifier of the record is changed.

If a facility user changes the certifier of a record on the **Certification** tab after the record has been certified, the following message will appear:
Figure 96: Record Decertification Confirmation Message

Select No to keep the record certified and change no information. Select Yes button to de-certify the record. The record will have to be certified again before a facility user can release the record.

The following message will appear once the record has been de-certified:

Figure 97: Decertification Completed Successfully Message

3.19 Generating Reports

3.19.1 Birth Institution Registration and Timeliness Audit Report

The application provides facility users the ability to generate a Birth Institution Registration and Timeliness Audit report.

1. Select the Reports/Birth Institution Registration and Timeliness Audit Report menu option.

2. The following screen will appear:

Figure 98: Birth Institution Registration and Timeliness Audit Report Screen
3. Complete the fields on the input screen.

4. Select Excel or PDF for the report’s format.

5. Print the document from the PDF window or from Microsoft Excel.

6. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

3.19.2 Birth Records Released But Pending AOP Report
The application provides facility users the ability to generate a Birth Records Released But Pending AOP report.


2. The following screen will appear:

![Birth Records Released but Pending AOP Report Screen](image)

3. Complete the fields on the input screen.

4. Select Excel or PDF for the report’s format.

5. Print the document from the PDF window or from Microsoft Excel.

6. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

3.19.3 Certified by Certifier Report
The application provides facility users the ability to generate a Certified by Certifier report.

1. Select the Reports/Certified by Certifier Report menu option.

2. The following screen will appear:
3. Complete the fields on the input screen.

4. Select **Excel** or **PDF** for the report’s format.

5. Print the document from the **PDF** window or from **Microsoft Excel**.

6. When the document is printed, close the **PDF** window or **Microsoft Excel** using the **X** in the upper right corner of the screen to return to the **TxEVER** system.

### 3.19.4 Facility Productivity Report

The application provides facility users the ability to generate a **Facility Productivity** report.

1. Select the **Reports/Facility Productivity Report** menu option.

2. The following screen will appear:
3. Complete the fields on the input screen.

4. Select Excel or PDF for the report’s format.

5. Print the document from the PDF window or from Microsoft Excel.

6. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

3.19.5 Hospital AOP Report
The application provides facility users the ability to generate a Hospital AOP report.

1. Select the Reports/Hospital AOP Report menu option.

2. The following screen will appear:

![Hospital AOP Report Screen](image)

Figure 102: Hospital AOP Report Screen

3. Complete the fields on the input screen.

4. Select Excel or PDF for the report’s format.

5. Print the document from the PDF window or from Microsoft Excel.

6. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

3.19.6 Listing of Unmatched Births with High Probability of Death Report
The application provides facility users the ability to generate a Listing of Unmatched Births with High Probability of Death report.


2. The following screen will appear:
3. Complete the fields on the input screen.

4. Select **Excel** or **PDF** for the report’s format.

5. Print the document from the **PDF** window or from **Microsoft Excel**.

6. When the document is printed, close the **PDF** window or **Microsoft Excel** using the X in the upper right corner of the screen to return to the TxEVER system.

### 3.19.7 Multiple Birth Exception Report

The system provides facility users the ability to generate a **Multiple Birth Exception** report.

1. Select the **Reports/Multiple Birth Exception Report** menu option.

2. The following screen will appear:

![Multiple Birth Exception Report Screen](image)

3. Complete the fields on the input screen.

4. Select **Excel** or **PDF** for the report’s format.

5. Click **Generate**.

6. Print the report from the **PDF** window or from **Microsoft Excel**.
7. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

**3.19.8 Multiple Birth Report**
The system provides facility users the ability to generate a Multiple Birth report.

1. Select the Reports/Multiple Birth Report menu option.
2. The following screen will appear:

![Multiple Birth Report Screen](image)

**Figure 105: Multiple Birth Report Screen**

3. Complete the fields on the input screen.
4. Choose Excel or PDF for the report’s format.
5. Click Generate.
6. Print the report from the PDF window or from Microsoft Excel.
7. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

**3.19.9 Record Status Report**
The system provides facility users the ability to generate a Record Status report.

1. Select the Reports/Record Status Report menu option.
2. The following screen will appear:
3. Complete the fields on the input screen.

4. Select Excel or PDF for the report’s format.

5. Press Generate.

6. Print the document from the PDF window or from Microsoft Excel.

7. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

### 3.19.10 Rejected Records Report

The system provides facility users the ability to generate a Rejected Records report.


2. The following screen will appear:
3. Complete the fields on the input screen.

4. Select Excel or PDF for the report’s format.

5. Press Generate.

6. Print the document from the PDF window or from Microsoft Excel.

7. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

3.19.11 Uncertified by Certifier Report
The system provides facility users the ability to generate an Uncertified by Certifier report.


2. The following screen will appear:

![Facility Birth Uncertified By Certifier Report Screen](image)

Figure 108: Uncertified by Certifier Report Screen

3. Complete the fields on the input screen.

4. Select Excel or PDF for the report’s format.

5. Press Generate.

6. Print the document from the PDF window or from Microsoft Excel.

7. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.
3.19.12    **Unresolved Record Report**

The system provides facility users the ability to generate an **Unresolved Record** report.

1. Select the **Reports/Unresolved Records Report** menu option.

2. The following screen will appear:

   ![Facility Unresolved Record Status Report](image)

   **Figure 109: Unresolved Record Report Screen**

3. Select **Excel** or **PDF** for the report’s format.

4. Press **Generate**.

5. Print the document from the **PDF** window or from **Microsoft Excel**.

6. When the document is printed, close the **PDF** window or **Microsoft Excel** using the X in the upper right corner of the screen to return to the **TxEVER** system.

3.19.13    **User Status and Case Related Activity Report**

The system provides facility users the ability to generate a **User Status and Case Related Activity** report.

1. Select the **Reports/User Status and Case Related Activity Report** menu option.

2. The following screen will appear:
3. Select Excel or PDF for the report’s format.

4. Press Generate.

5. Print the document from the PDF window or from Microsoft Excel.

6. When the document is printed, close the PDF window or Microsoft Excel using the X in the upper right corner of the screen to return to the TxEVER system.

3.20 Release 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.

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.

3.20.1 Release of a High Risk Record

If the record being released is that of a high risk birth, the following message will be displayed:
1. If Yes, the system will display the following message:

![Figure 111: High Risk Record Release Message](image)

- Click Yes to release the record.
- Click No to cancel the release of the record.

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

![Figure 112: Record Release Message](image)

- Click Yes to release the record.
- Click No to cancel the release of the record.

![Figure 113: Death Record Creation Reminder Message](image)
3.20.2 Release of a Record with an Associated AOP

If the record being released is associated with a AOP and all fields are resolved except the Date AOP signed field in the **Mother** tab, the birth clerk may select the **Record/Print/Acknowledgement of Paternity** menu item to print the **Acknowledgement of Paternity** form. The following message will appear if the user prints the AOP form:

![Figure 114: AOP Printed Message](image)

1. Click **OK** to open the **Acknowledgement of Paternity** form in a PDF window.
2. The **Date AOP Signed** field in the **Mother** tab can be completed after the Acknowledgement of Paternity form is printed. Resolve the field and save the record before attempting to release the record. After saving the record, certify the record and then select the **Record/Release** menu item. The following message will appear:

![Figure 115: Release of Record with AOP Message](image)

3. Click **OK** to confirm completion of the AOP and release the record.
   
   **OR**
   
   Click **Cancel** to exit the message without confirming completion of the AOP; the record will not be released.
4 Facility Statistical Correction
This section provides detailed information about the TxEVER Birth application regarding functions related to Facility Statistical Corrections.

4.1 Start a Facility Statistical Correction
The Statistical Corrections menu item function allows authorized users to submit a statistical correction on a birth record within the TxEVER Birth module.

1. Select the Function/Facility Statistical Correction menu item.
2. The Facility Statistical Correction screen will load:

<table>
<thead>
<tr>
<th>GLOBAL</th>
<th>BIRTH</th>
<th>FETAL DEATH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEXAS Health and Human Services</td>
<td>Texas Department of State Health Services</td>
<td>FUNCTIONS</td>
</tr>
</tbody>
</table>

**Figure 116: Main Facility Statistical Correction Screen**

3. Retrieve an existing record using the Work Queue Search.
4. Select the Record/Statistical Correction menu option to open the desired record in the Statistical Corrections screen, as shown below:
5. After coming to a field that needs to be corrected, click the icon located next to the appropriate field.
6. Enter the corrected value into the field.

7. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click either the **Scan Document** or **Upload Document** icon.

### 4.1.1 Scan Supporting Documentation

To scan supporting documentation:

1. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon.
If the user does not intend to scan in any supporting documentation, they can press the **Save Document without Scan** icon after entering a corrected value in the **New Data** section.

2. The **Scan Documents** window will appear.

![Scan Documents window](image)

3. 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**.

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

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

6. Click the X in the right corner of the **Scan** window to close the window and return to the **Corrections** screen.

7. The user can choose to scan more supporting documentation by clicking the **Scan Another Document** icon and completing the scanning process again.

8. Save the changes by clicking the **Confirm Changes** button in the **New Data** section.
4.1.2 Upload Supporting Documentation

To upload supporting documentation:

1. Add any supporting documentation at this time by completing the fields in the 
   Supplemental Documents section located at the bottom of the screen and then click 
   the Upload Document icon.

![Figure 122: Supplemental Documents Section]

2. The File Upload screen will appear.

![Figure 123: File Upload Screen]

3. Click the Browse button to open the File Upload screen.

4. Locate the desired .tif or .tiff file and click the Open button.

5. The File Upload screen will appear as seen below:
6. Click the **Save** button.

7. The following message will appear:

![Figure 124: File Upload Screen with File Selected](image)

8. Click **OK** to close the message.

9. Save the changes by clicking the **Confirm Changes** button in the **New Data** section of the **Corrections** screen.

### 4.2 Submit a Facility Statistical Correction

To submit a statistical correction:

1. Select the **Process/Submit** menu item or click the **Submit** icon.
2. The following message will appear:

![Figure 126: Record Submission Confirmation Message](image)
3. Click the **Yes** button to confirm submission of the correction. The following message will appear:

![Figure 127: High Priority Record Confirmation Message](image1)

4. Click the **Yes** button to submit the correction as high priority.
   
a. Click the **No** button to decline submitting the correction as high priority.

5. The **Enter PIN** screen will appear:

![Figure 128: Enter PIN Screen](image2)

6. Enter in a valid PIN and click the **OK** button.

7. The following message will appear:

![Figure 129: Record Submitted Successfully Message](image3)

### 4.3 Cancel a Facility Statistical Correction

To cancel a statistical correction:

1. With the Statistical Correction screen open, select the **Process/Cancel** menu item or click the **Cancel** icon.

### 4.4 View Corrections

To view corrections:

Page | 101
1. With the Statistical Correction screen open, select the **Process/View Corrections** menu item or click the **View Corrections** icon.

4.5 **Reject Facility Statistical Correction**

The **Reject** Statistical Corrections menu item function allows authorized users to reject completing a statistical correction on a birth record within the **TxEVER Birth** module.

1. After accessing the main Facility Statistical Correction screen and retrieving a record from the work queue, select the **Record/Reject Statistical Correction** menu option.

2. The following message will appear:

   ![Figure 130: Record Review Confirmation Message](image)

   **Figure 130: Record Review Confirmation Message**

3. Click the **Yes** button to confirm that the record has been reviewed.
   
   a. Click the **No** button to close the message and be returned to the Statistical Corrections screen.

4. The Reject Record screen will load:

   ![Figure 131: Reject Record Comment Screen](image)

   **Figure 131: Reject Record Comment Screen**

5. Enter a reason for the rejection and click the **OK** button.

Page | 102
a. Click the **Close** button to close the screen and be returned to the Statistical Corrections screen.
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 132: 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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Type</td>
<td>Select a record type from the dropdown list</td>
</tr>
<tr>
<td>Plurality</td>
<td>Select the number of children delivered</td>
</tr>
<tr>
<td>Child Last Name</td>
<td>Enter Text</td>
</tr>
<tr>
<td>Child Date of Birth</td>
<td>Enter Date</td>
</tr>
<tr>
<td>Mother’s Last Name</td>
<td>Enter Text</td>
</tr>
</tbody>
</table>

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

6. The system will display the following message:

![Figure 133: 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 134: 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.

![AOP Search Screen](image)

Figure 135: 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.

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 users login location that still require some type of
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:

   - **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.

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 facility 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:

   ![AOP-Partial Record Search Result Screen](image)

   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. The **AOP to AOP Discrepancy** screen will appear:

   ![AOP to AOP Discrepancy Screen](image)
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 141: Save Changes Confirmation Message](image1)

   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, the a screen similar to the one shown below will appear:

   ![Figure 142: AOP and DOP Signature Removal Screen](image2)

      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:

![Retain Signature Comment Screen](image)

**Figure 143: 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:

![Record Successfully Updated Message](image)

**Figure 144: 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:
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 the **Save** icon.

5. The following message will appear:

![Figure 146: Record Successfully Updated Message](image)

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:

![Record Abandon Confirmation Message](image)

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.

![Abandon Record Comment Screen](image)

4. The following message will appear:

![Record Abandoned Successfully Message](image)
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.

![Unresolved Fields List](image)

**Figure 150: 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:
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 Screen](image)

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.
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 154: AOP Submission 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:

![Record Submitted Successfully Message](image)

Figure 155: 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:
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:
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 158: Record Link Confirmation Message](image)

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 159: AOP Discrepancy Screen](image)

5. 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.
6. The following message will appear:

![Figure 160: Record Linked Successfully Message](image)

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 161: Record Delink Confirmation Message](image)

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

4. The following message will appear:

![Figure 162: Scan/Upload Supporting Document Confirmation Message](image)

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

6. The following screen will appear:
a. To scan a document, press Scan Document, which will generate the following window:

![Scan Documents Screen](image1)

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 165: Upload Document Screen](image)

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 166: AOP Release Confirmation Message](image)

   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 167: 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 168: Uploaded AOP Forms to Folder Viewer Screen](#)
6 Approvals

Sign-off Sheet

I have read the above TxEVER Birth Module Facility User Guide and accept the contents herein written.

Project Sponsor: ________________________________ Date

Senior Project Manager: ________________________________ Date

Genesis Project Manager: ________________________________ Date