## DEPARTMENT OF HEALTH

# **Invoice electronic funeral home requests**

## MR&C USER GUIDE FOR COUNTY VITAL RECORDS STAFF

This user guide covers the steps to:

Create an invoice

Print an invoice (and update billing address if needed)

Apply payment to invoice

# **Create invoice**

You can invoice for any funeral home request submitted to your office, even if you haven't issued certificates yet.

After logging in to MR&C:

- 1. Select the **Customer Service** tab.
- 2. Select *Create invoice (Funeral home request)* from the **Tasks** menu.
- 3. Optional: Enter a date or date range of the request(s) to invoice.
- 4. To find a funeral home, start typing the establishment name and use the *Enter* key on your keyboard to select it.
- 5. Optional: Check Include uninvoiced requests only
- 6. Click Search.
- 7. Check the box on the left side of the search results table for the requests(s) you want to invoice.

Note: Checking multiple requests at once will assign the same invoice number to all.

8. Click the **Create invoice** button in the lower right corner to assign an invoice number.

# **Print invoice**

### Option #1:

- 1. After completing steps 1-8 above, click the **Print receipts** button at the bottom of the page.
- 2. Follow the screen prompts to open and print the pdf.

**Note:** This will print both an invoice and receipt, addressed to the person who requested certificates. To change the billing address, see option #2.

#### INVOICE ELECTRONIC FUNERAL HOME REQUESTS

### Option #2:

- 1. Select *Search invoice* from the **Tasks** menu.
- 2. Enter search criteria.
- 3. Click Search.
- 4. Select the invoice number you want to print.
- 5. Click **Copy Requester Info** to populate the name of the person who requested certificates, along with their funeral home name and address.

**Note:** To send the invoice to a different location, complete the name and address section manually.

- 6. Click Save.
- 7. Click Print.
- 8. Follow the screen prompts to open and print the pdf.

# **Apply payment**

After logging in to MR&C:

- 1. Select the **Customer Service** tab.
- 2. Select *Search invoice* from the **Tasks** menu.
- 3. Enter search criteria.
- 4. Click Search.
- 5. Select the invoice number you want.
- 6. Click the View Payment Details link.
- 7. Click Add payment.
- 8. Select the payment type.
- 9. Enter the payment amount using whole numbers (19 or 63, for example).
- 10. Enter any other required information, such as the check number or last four digits of the credit or debit card.
- 11. Click Save.

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#### INVOICE ELECTRONIC FUNERAL HOME REQUESTS

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To obtain this information in a different format, call: 651-201-5970.