



RECORDING PASSPORT

RELEASE v7.3.0

January 2018

Computer Arts, Inc. is pleased to announce the release of Recording Passport Software v7.3.0. This user friendly addition to CAI Recording is available for use with the Recording v7.3.0 update.

Users will be able to:

- Accept passport applications and payments
- Create the transmittal form for the U. S. Department of State
- Print passport activity reports

Users with a CAI Recording log in and password will not need additional security, please use the same log in profile as you do with all CAI Recording applications.

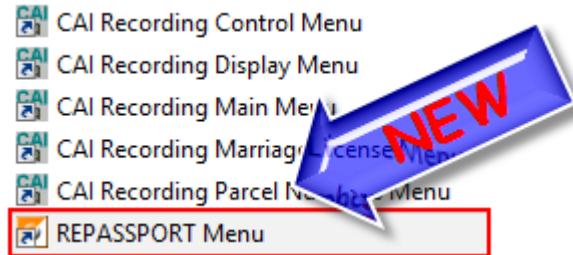
The following pages provide details and instructions to use this application. Please share this documentation with all Recording Passport users in your offices.

We appreciate the input from our users in helping to prioritize and aid in the development of all of our programs.
If you have any questions, please feel free to contact our help desk.

Computer Arts, Inc.
Help Desk Support
(208) 955-0151 local
(800) 365-9335
support@gocai.com

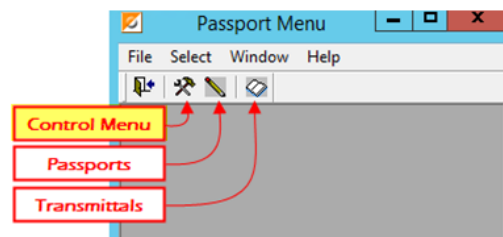
Control Menu

From the CAI Recording folder, open the REPASSPORT Menu with your CAI Recording log in profile and password.



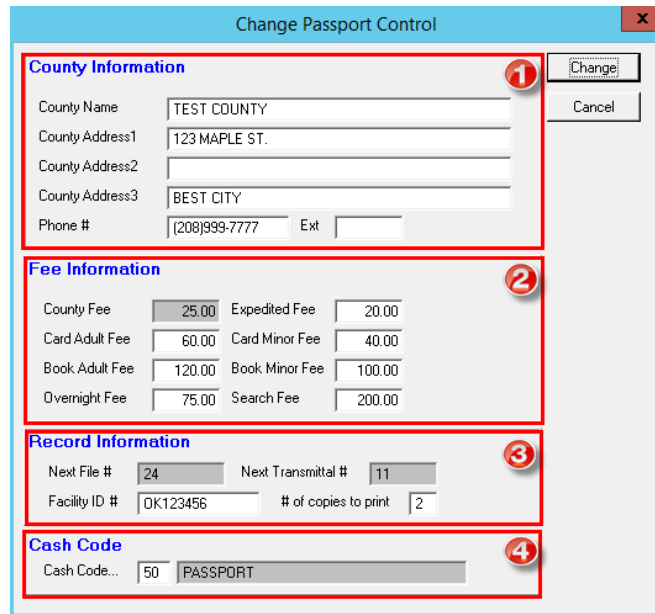
The following lists the menus accessible from this panel:

Click the Control Menu icon to set up the necessary information specific to your county.




The Control Menu is set up in four sections:

1. **County Information.** Enter the contact information for your county in this section.
2. **Fee Information.** All fees will need to be manually entered except for the County Fee.
3. **Record Information.** This section tracks the file and transmittal #'s, Facility ID (where the passport applications and non-county fees will be sent) and the user may set the number of copies of receipts to print for the customer payment.
4. **Cash Code.** Enter the county cash code for Passport Fees that exist for your particular county (from Recording Control cash codes table).

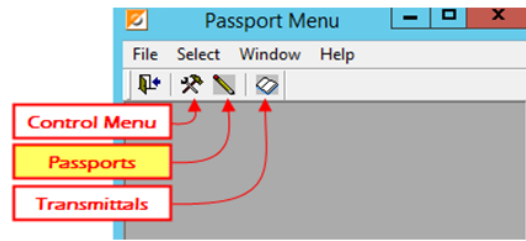


Change Passport Control			
County Information ①			
County Name	TEST COUNTY		
County Address1	123 MAPLE ST.		
County Address2			
County Address3	BEST CITY		
Phone #	(208)999-7777	Ext	
[Change] [Cancel]			
Fee Information ②			
County Fee	25.00	Expedited Fee	20.00
Card Adult Fee	60.00	Card Minor Fee	40.00
Book Adult Fee	120.00	Book Minor Fee	100.00
Overnight Fee	75.00	Search Fee	200.00
Record Information ③			
Next File #	24	Next Transmittal #	11
Facility ID #	OK123456	# of copies to print	2
Cash Code ④			
Cash Code...	50	PASSPORT	

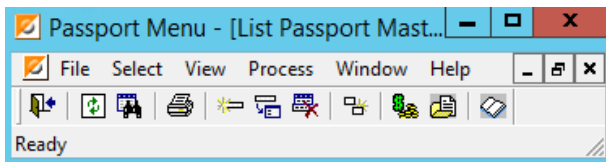
Passport Menu


From the Passport Menu, click the Passports  icon to open the List Passport Menu.

This is where passport applications are entered, payment records are created and receipts may be printed.



➤ Add Passport Information



To create a new passport entry, click the **Add**  icon to open the Add Passport Master window.

This panel contains four sections that require information on the passport applicant.

Applicant Information	
Name	
Address 1	
Address 2	
Address 3	
Date of Birth	0/0/0000
Age	0
Phone #	() . -

Dates	
Application Date	1/19/2018
Departure Date	0/0/0000

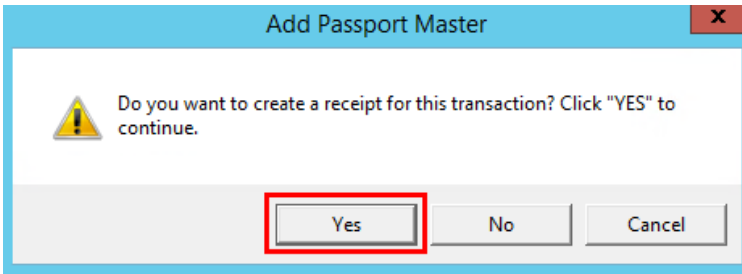
Passport Fees	
Type of Passport	*BLANK
Passport Fee	0.00
Type of Service 1	*BLANK
Service Fee 1	0.00
Type of Service 2	*BLANK
Service Fee 2	0.00
Type of Service 3	*BLANK
Service Fee 3	0.00

County Amount	
County Amount	25.00
Check #	
Passport Service Amount	0.00
Check #/MO #	
Comments	

1. **Applicant Information.** Complete all fields in this section.
2. **Dates.** Application date defaults to current date and Departure Date is a required field.
3. **Passport Fees.** The Passport Fee will be paid to the county by the applicant. All other fees are sent to the U. S. Department of State along with the application(s) and transmittal(s).
4. The last section is for the printed cash receipt to the customer. The check # field is to enter payment information for the county (passport) fee and the Check #/MO # field is for the fee(s) that will be sent with the passport.

Click the **Add** button.

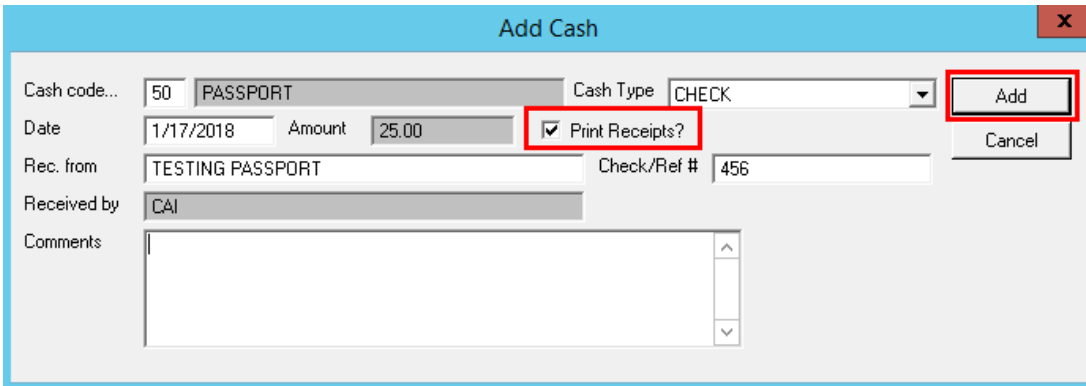
The confirmation window will pop up, click **Yes** to create a receipt for the transaction.



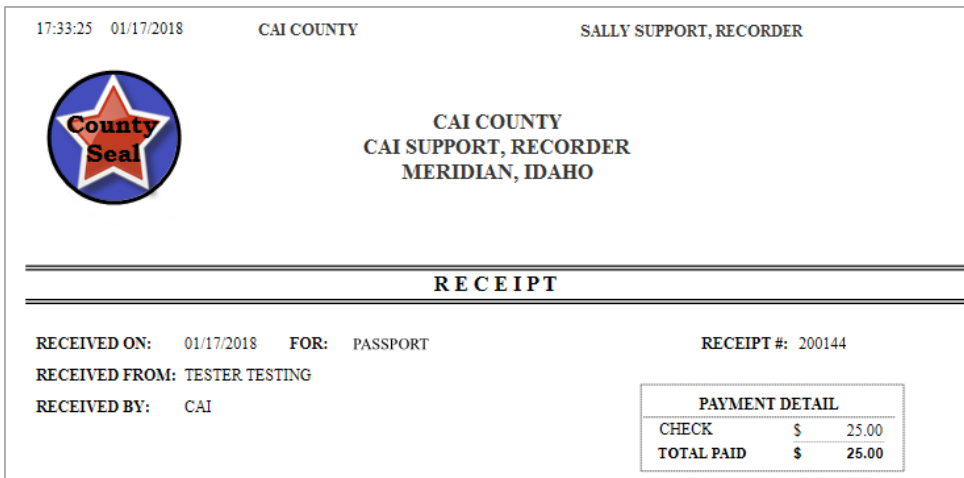
Note: This receipt will also be generated in the CAI Recording Main Menu/Cash Receipts menu.

The following Add Cash window appears to create the cash receipt.

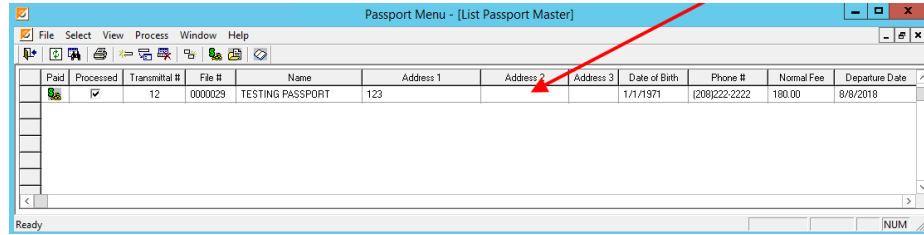
Click the **Print Receipts** box, enter any necessary Comments and then click **Add** to print the cash receipt:



This is the cash receipt that will print:

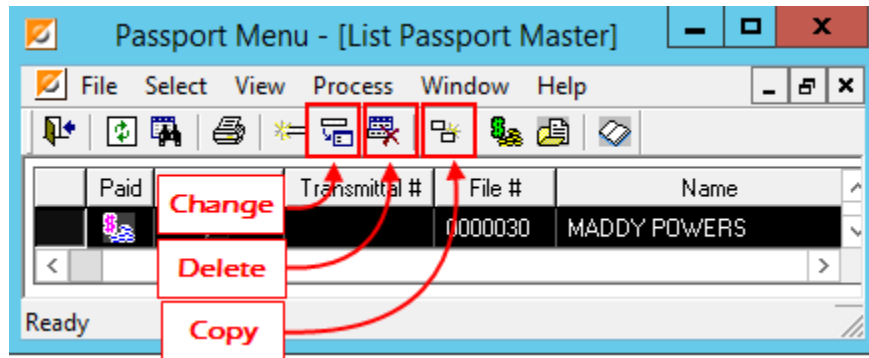


Now you will be able to see the most recently added passport at the top of the List Passport Master grid.




➤ Edit Passport Information

If any changes to the passport information is needed, you may copy, change or delete the entry. Highlight the entry to change then click Change, Delete or Copy and make any necessary changes.

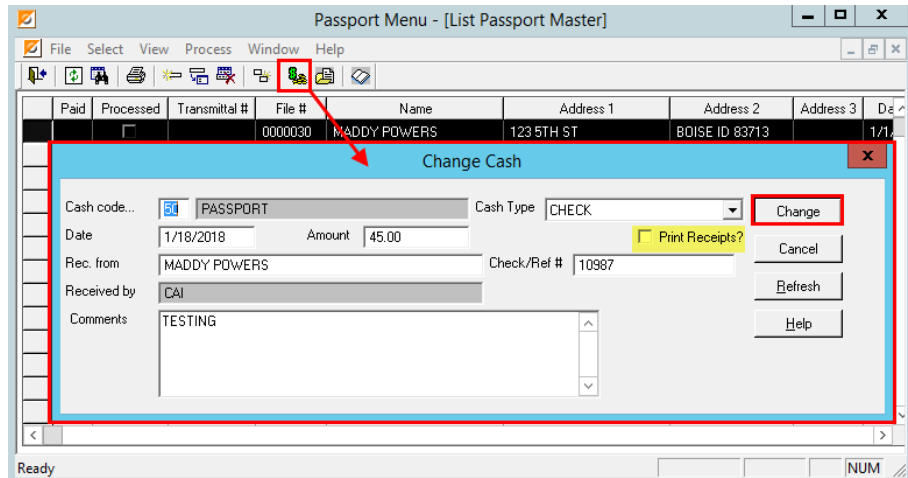


➤ Create/Change/Print Cash Receipt

To create, change or print the cash receipt for an applicant, click to highlight the name and select the Create/Change/Print Receipt  icon from the toolbar.

The Change Cash panel will open for you to make necessary changes, or click the Print Receipt box and then the **Change** button to print the receipt.

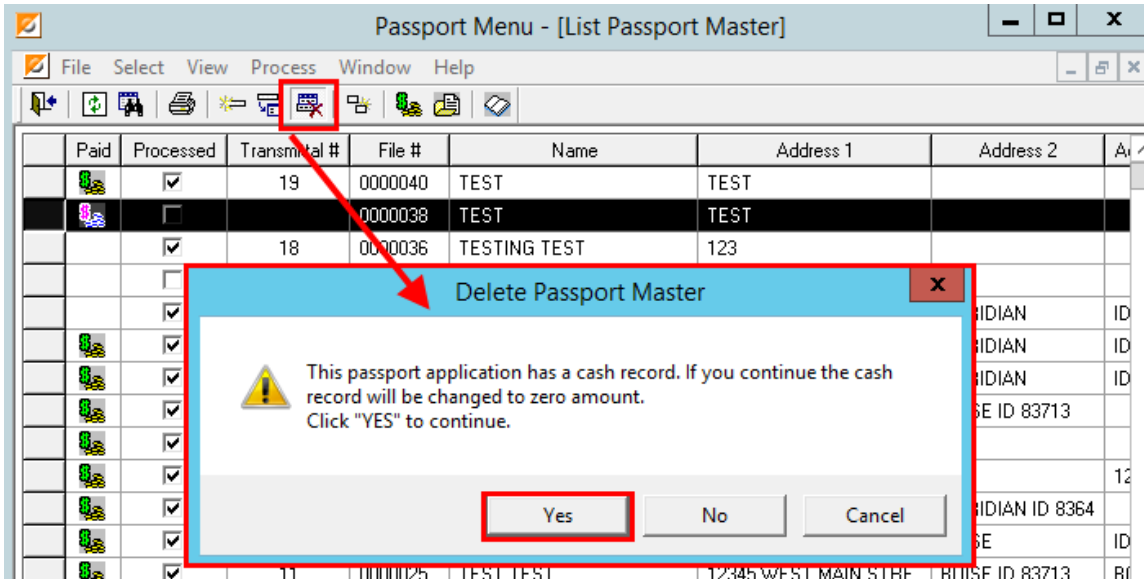
When changes are complete, click the **Change** button.



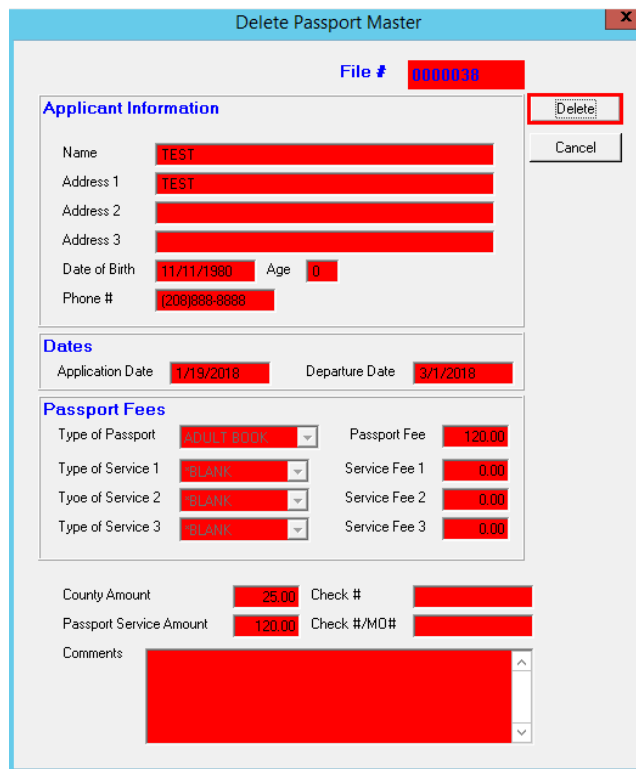
➤ Delete

If an application entry has not been processed on a transmittal, it may be deleted. If the customer has paid the county passport fee and received a cash receipt, the receipt record will be zeroed out (in the Recording Main cash receipts).


To delete a passport entry, click the Delete  icon to open the confirmation message:



Confirm to delete by clicking the Delete button.



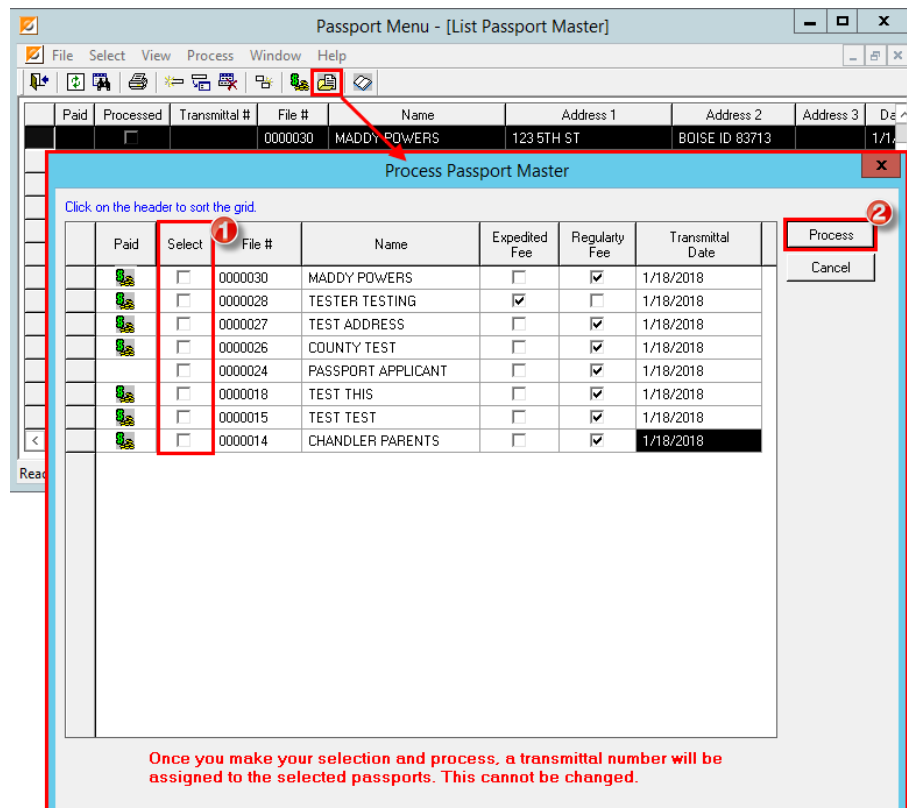
➤ Process Transmittal

To process a passport transmittal from the List Passport Master Panel, click the Process Transmittal  icon to open the Process Passport Master panel (passports may also be transmitted in the Transmittal Master, see page 11).

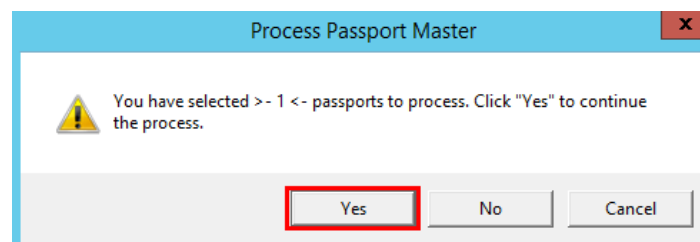
The process panel will have a listed grid of applicant names that have not been processed for transmittal.

To Process:

1. Select the name(s) to process by selecting (double-clicking) the box in the Select column.
2. Click the **Process** button.



The following notification will appear, click **Yes** to process.



The Add Passport Transmittal Master panel will appear. Select 'Type of Print' (either Routine or Expedite), enter any remarks if necessary, along with the Priority Mail Confirmation # (if applicable). When finished, click the **Add** button to process.

This confirmation will appear, click **Yes** to print the Transmittal Report .

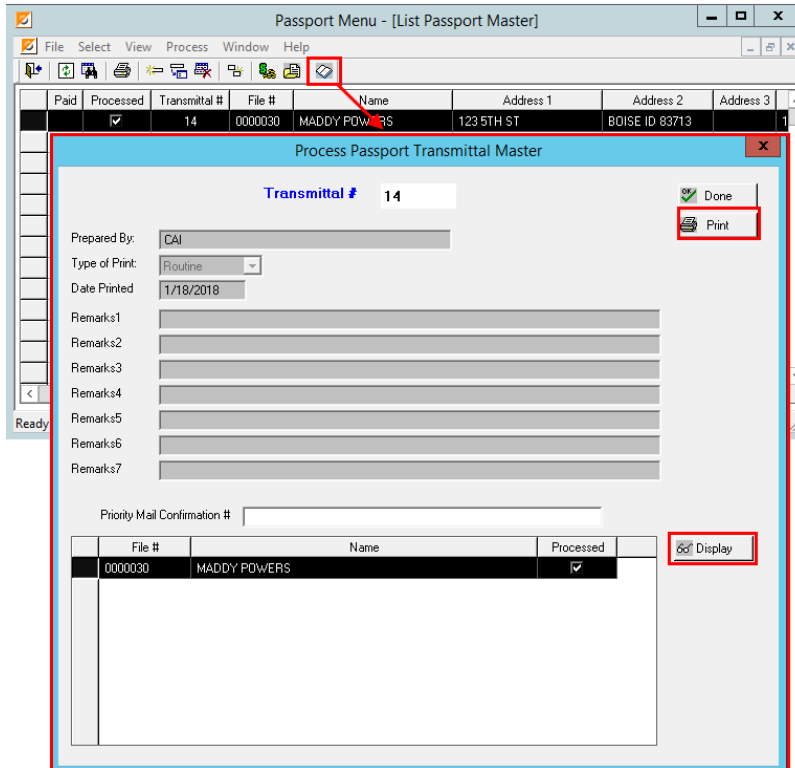
Passport Application Transmittal Form DS-1832 will print:

U.S. DEPARTMENT OF STATE PASSPORT APPLICATION TRANSMITTAL		Facility Identification Number OK123456	Date 01/18/2018	<input checked="" type="checkbox"/> ROUTINE or <input type="checkbox"/> EXPEDITE	No. <u>1</u> of <u>1</u>									
Name of Facility: TEST COUNTY 123 MAPLE ST. BEST CITY			Facility Telephone Number (208) 999-7777											
No.	Applicant's Name	Date of Birth	Telephone Number	Passport Book		Passport Card		Overnight Return Delivery Service	Expedite Fee	File Search Fee	Total Fees to Dept. of State \$\$	No Fee	Exec. Fee	Clerk Initial
				Minor Fee	Adult Fee	Minor Fee	Adult Fee							
1	TEST ADDRESS	11/11/1990	(208) 888-8888		X			75.00	20.00	200.00	120.00		25.00	X
2														
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
Agent's Stamp or Seal: 12341234			Prepared by: CAI Signature: Transmittal Tracking or Delivery Confirmation #: 16				Number of Applications included on Transmittal: 1							

Form DS-1832 02/11 This Transmittal is to be included in the same envelope as the applications listed above when mailing. Please retain a copy of this transmittal for your records.

➤ View Processed Transmittals

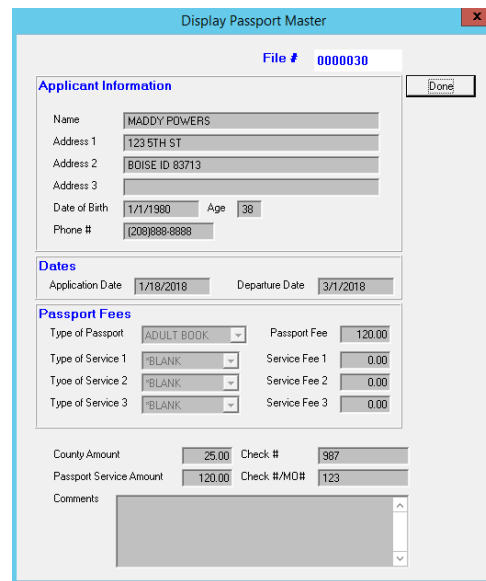
Highlight the passport you want to view or print and click the View Processed Transmittals icon from the toolbar.



This will display the Processed Passport Transmittals for the selected name.

If you select the Display button, the information that was entered on the initial passport will open.

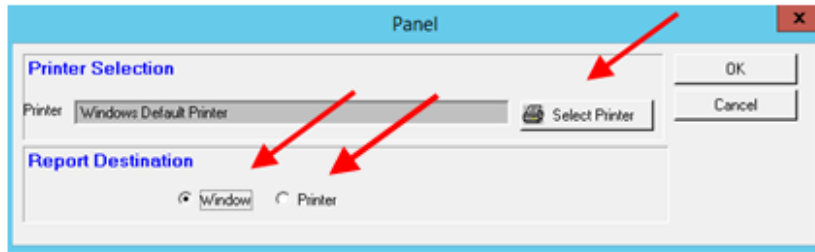
Click the Done button to close this panel.




If you select the Print button on the Transmittal Master panel, then you will have the option to print to window (view) or to a printer.

If the wrong printer is listed and you would like to print a paper copy, click the Select Printer button to make correct choice. Click the Printer radio button and click **OK** to print.

This will print the same Passport Application Transmittal Form DS-1832 as shown on page 8.

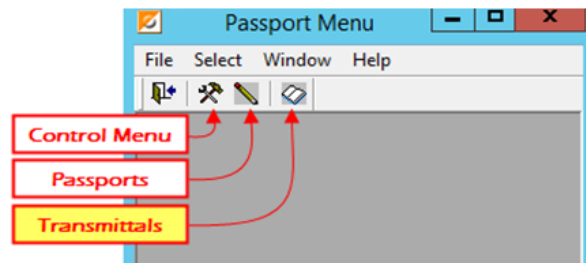


Transmittal Menu


From the Passport Menu, click the Transmittals  icon to open the List Passport Transmittal Master.

In this section, all passport transmittals processed are listed here.

Within this menu you will create a transmittal, print it and also print the Passport Activity Summary Report.

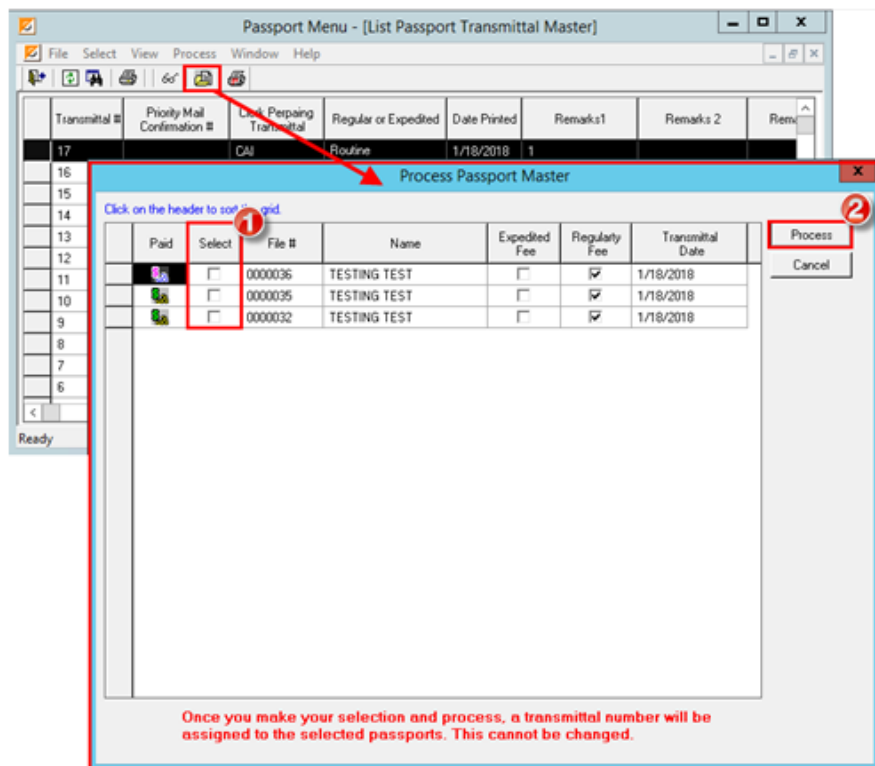


➤ Create Transmittals

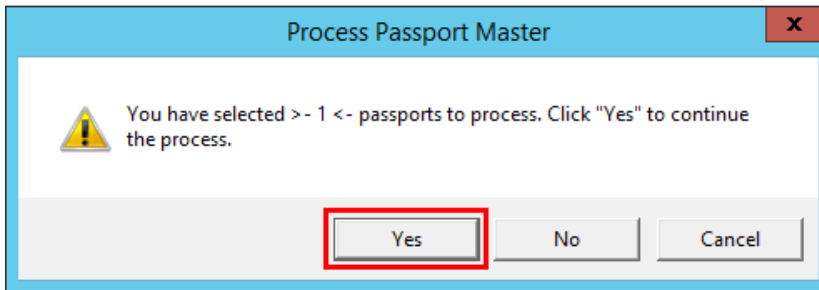
From the Transmittal Master Menu, click the Create Transmittal  icon to open the Process Passport Master panel.

All passports that have not been transmitted will appear in this panel.

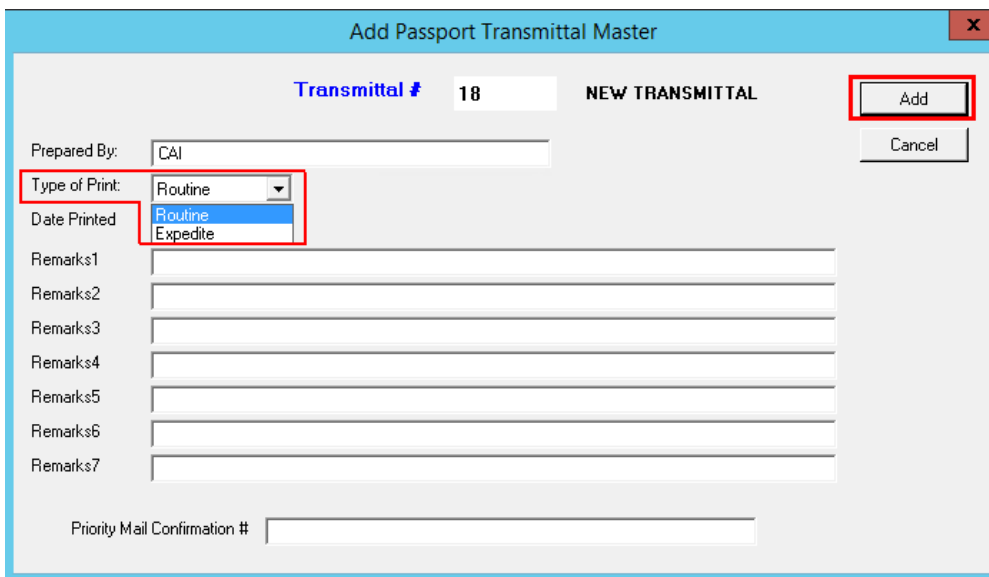
1. Click the box in the Select column to mark the passports to transmit.
2. Click Process to transmit.



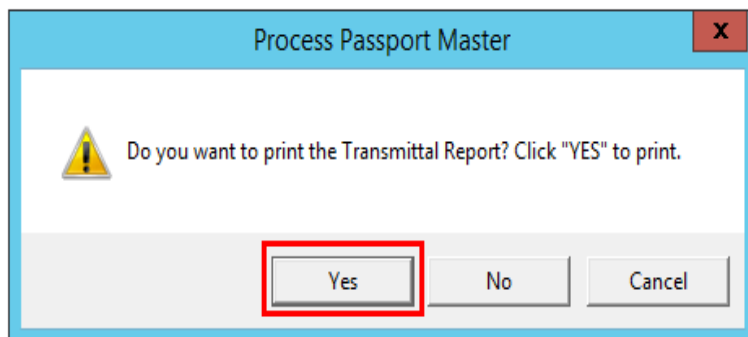
Click **Yes** to process:




In the following panel you will to make the Routine or Expedite 'Type of Print' selection, you can also add Remarks and enter the Priority Mail confirmation number. When finished, click the **Add** button.

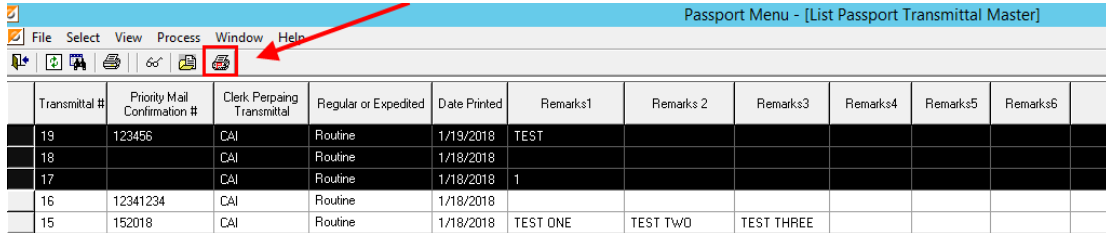


Click **Yes** to print the Transmittal Report. It will automatically print to the Windows default printer.




➤ **Printing**

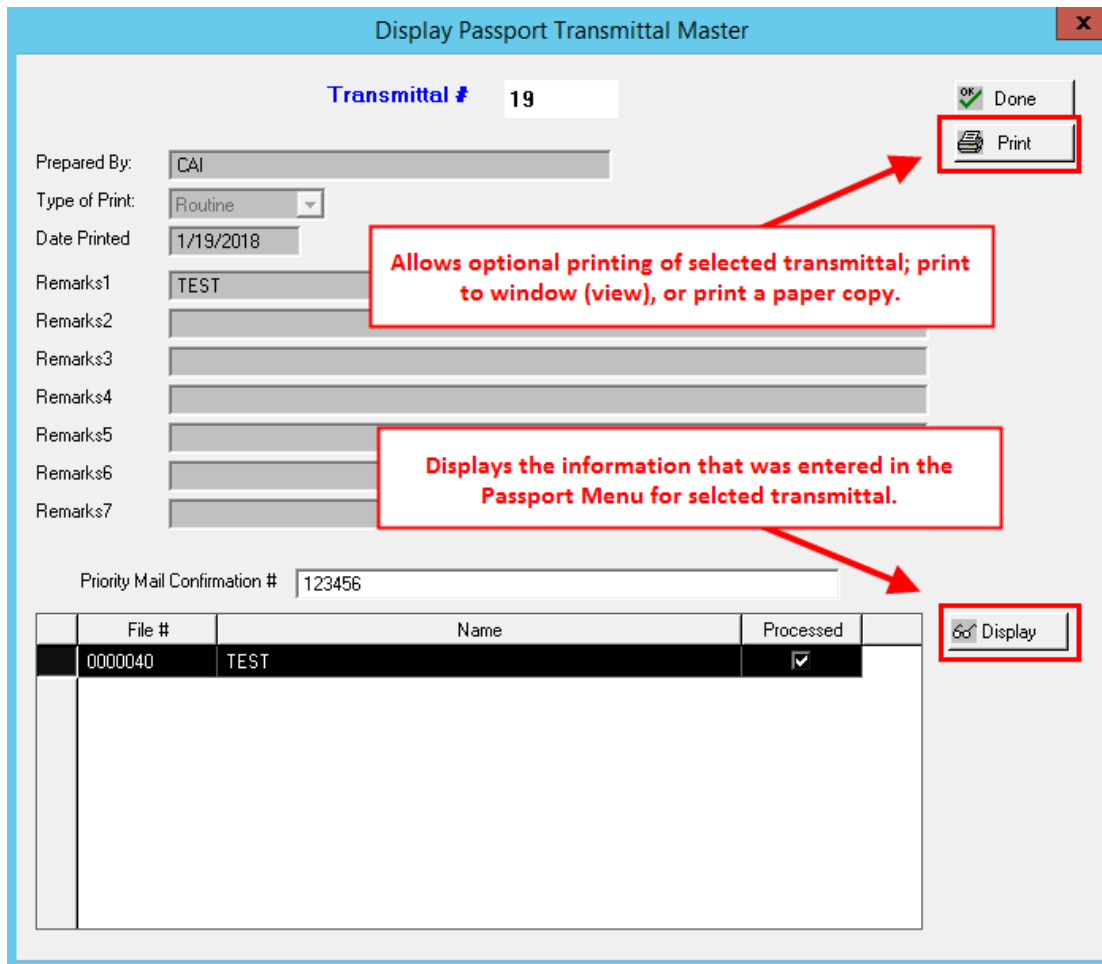
To reprint a Transmittal Report, select the transmittal(s) to print and click the Print Selected Transmittal  icon.



Transmittal #	Priority Mail Confirmation #	Clerk Perpaing Transmittal	Regular or Expedited	Date Printed	Remarks1	Remarks 2	Remarks3	Remarks4	Remarks5	Remarks6
19	123456	CAI	Routine	1/19/2018	TEST					
18		CAI	Routine	1/18/2018						
17		CAI	Routine	1/18/2018	1					
16	12341234	CAI	Routine	1/18/2018						
15	152018	CAI	Routine	1/18/2018	TEST ONE	TEST TWO	TEST THREE			

This will automatically print to the Windows default printer.

Transmittal reports may also be viewed and printed from the Display  icon. This will open the Display Passport Transmittal Master panel:



Transmittal # 19

Prepared By: CAI

Type of Print: Routine

Date Printed: 1/19/2018

Remarks1: TEST

Remarks2:

Remarks3:

Remarks4:

Remarks5:

Remarks6:


Remarks7:

Priority Mail Confirmation # 123456

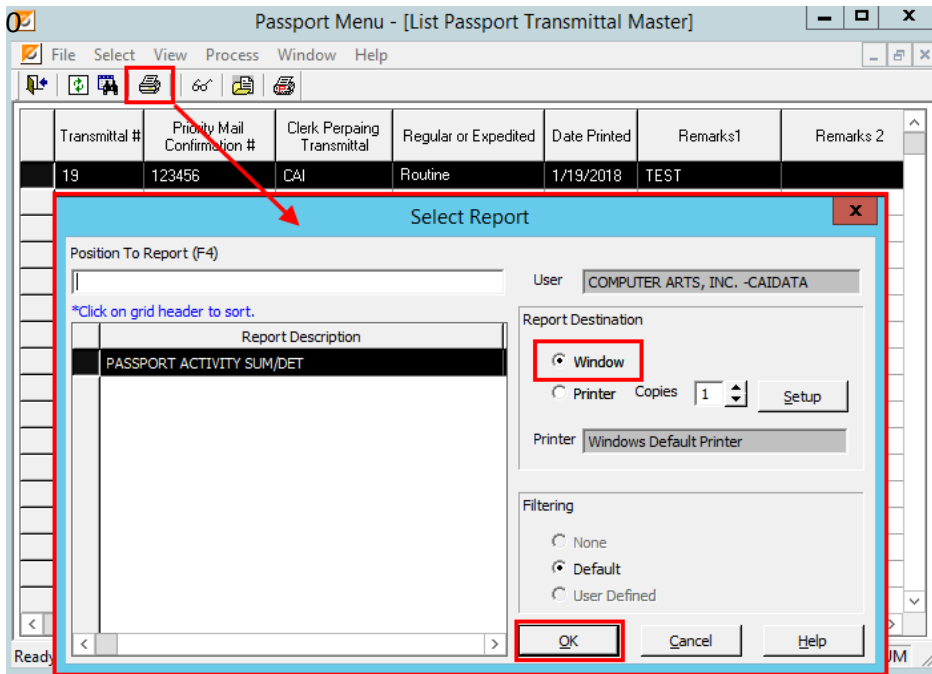
File #	Name	Processed
0000040	TEST	<input checked="" type="checkbox"/>

Allows optional printing of selected transmittal; print to window (view), or print a paper copy.

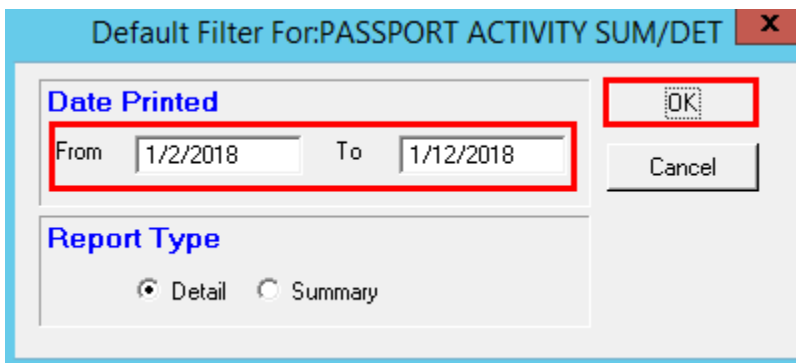
Displays the information that was entered in the Passport Menu for selected transmittal.

The Passport Activity Summary Report may be printed by clicking the Print  icon.

In the Report window, click the Window radio button to print to Window and click **OK**.



Enter the date range of the activity to print, choose Detail or Summary and click **OK**.



The Passport Activity Detail (RCPP10) report consists of all the information for each passport including Grand Total amounts for all fees.

01/19/2018 13:22:28 RCPP10 COMPUTER ARTS, INC. -CAIDATA CAI COUNTY		Page 1 of 1															
PASSPORT ACTIVITY DETAIL																	
From 01/02/2018 to 01/12/2018																	
Transmittal Number	Applicant's Name	Transmittal Date	Passport Book		Passport Card		Both Book & Card		Overnight Return Fee	Expedite Fee	File Search Fee	Total To Dept State	Exec Fee	Grand Total Fee	No		
			Minor Fee	Adult Fee	Minor Fee	Adult Fee	Minor Fee	Adult Fee									
0	PETER GRANT	01/04/2018	0.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	200.00	320.00	25.00	345.00			
0	RACHEL GRANT	01/04/2018	0.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	200.00	320.00	25.00	345.00			
1	RON W EASLEY	01/08/2018	0.00	120.00	0.00	0.00	0.00	0.00	200.00	0.00	0.00	320.00	25.00	345.00			
2	TEST	01/10/2018	0.00	0.00	0.00	60.00	0.00	0.00	0.00	20.00	0.00	80.00	25.00	105.00			
2	NANCY R LARKIN	01/10/2018	0.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	120.00	25.00	145.00			
3	BOBBY JEAN BROOKES	01/11/2018	0.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	120.00	25.00	145.00			
4	PETER MASTERS	01/12/2018	0.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	120.00	25.00	145.00			
Total Transmittals Processed:			5	Total Fees		0.00	720.00	0.00	60.00	0.00	0.00	200.00	20.00	400.00	1,400.00	175.00	1,575.00
Total Applications Processed:			7														

The Passport Activity Summary Report is has less information than the Detail Report. It doesn't include itemized fees and names:

01/19/2018 13:09:59 RCPP10 COMPUTER ARTS, INC. -CAIDATA CAI COUNTY		Page 1 of 1													
PASSPORT ACTIVITY SUMMARY															
From 01/02/2018 to 01/12/2018															
Transmittal No.	Transmittal Date	Mail Tracking Number	Shipping Method	No. Applicants	Total Fees to State	Total Exec Fee	Grand Total								
0	01/04/2018	A123456	Routine	2	640.00	50.00	690.00								
1	01/08/2018	1211	Routine	1	320.00	25.00	345.00								
2	01/10/2018	ABCDEFGHIJKLMN OPQSTUVW XYZ	Routine	2	200.00	50.00	250.00								
3	01/11/2018	15286312XY5223R	Routine	1	120.00	25.00	145.00								
4	01/12/2018		Routine	1	120.00	25.00	145.00								
				Grand Total	7	\$1,400.00	\$175.00	\$1,575.00							