

## MR&C Processes for Local Issuance Offices

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### Request to Exchange Birth or Death Certificates

**Note:** A birth or death certificate may be exchanged after a record has been corrected or amended.

1. Click on the **Customer Service** tab.
2. Select [Enter Request](#) from the **Tasks** menu.

#### **Request Information Page**

1. Your default **Issuance office** should already be selected. If you work at multiple offices you will need to choose your current location.
2. Select the **Request source**.
3. Click **Add request item** and choose the **Request item type**. Exchanges have their own item types.
4. Enter the **Date of issuance** for the certificate(s) being exchanged.
5. Change the **Quantity** if needed. If a VA copy is being exchanged with other death certificates, do not include that in this quantity (see steps 10 and 11).
6. Click **Recalculate**.
7. Optional: select a **Reason** for the request.
8. Enter the **Requester information** provided. Fields marked with a red asterisk (\*) are required.
9. You can enter **Notes** about the request at any point until the request is closed.
10. If you are exchanging a VA copy also, click **Save**. If not, skip to step 12.
11. Click **Add request item** and choose VA DEATH CERTIFICATE as the **Request item type**.
12. Click **Continue** and **OK** to move to the next page.

#### **Record Payment Page**

1. If there is no fee because the exchange is within one year of the original issue date, simply click **Continue** and **OK**.
2. If the exchange is more than one year since the original issue date, click **Add payment**.
3. Select **Payment type**. The screen will refresh so you can enter **Payment amount** and any additional information for check or credit card payments.
4. Click **Continue** and **OK** to move to the next page.

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### Request Item Details Page

1. If you entered multiple certificate request item types, at the bottom of the page you will see a table of these **Request items**. The first item will be starred (\*).
2. Click [Search birth records](#) or [Search death records](#) to link a record to the starred request item.
3. Enter **Search criteria** for the record requested and click **Search Births** or **Search Deaths**. Scroll down to the bottom of the page to view **Search Results**. If there are multiple results, the first record in the list will appear in the **Record summary** box.
4. Click on the name of the record requested. The screen will refresh and record will be highlighted (bold). Review details to verify it is the correct record. Click the **Select** button to the right of the requested record.
5. Select **Tangible interest**.
6. If you are exchanging a certificate for one record only, skip steps 7-10 and click **Continue** and **OK** to move to the next page.
7. If you have multiple certificate types, click **Save**.
8. Click on the next request item in the table. When the screen refreshes click [Search birth records](#) or [Search death records](#) again to link the death record to this item.
9. Select **Tangible interest** again.
10. Make sure that you have linked a birth or death record to each request item, then click **Continue** and **OK** to move to the next page.

### Request Summary Page

1. **Address verification**: If the requester's address has been verified, choose the address you want to print on the receipt (if you intend to print a receipt). If you do not choose an address, the address you entered will print by default. (**Note**: there is currently a defect in the system that duplicates the ZIP code on a receipt if you choose the verified address.)
2. Click **Send for fulfillment**. If all required information has been entered the request item status will change to **OPEN**. If the status remains **UNFINISHED** then you have missed a step somewhere.
3. Click **Fulfill** to the right of the first request item. The screen will refresh to a new page.
4. Click **Generate issuance document(s)** to print the record. Select **Open** on the File Download popup prompt.
5. Click on the printer icon. Depending on your default printer setting, you may need to click **Properties** and change your printer and/or print drawer. Click **OK** when you are ready to print and close the PDF window.

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6. If you want to print a receipt, check the Receipt box and click **Generate receipt/refund documents only**.
7. Follow step 5 to print receipt at any time prior to saving and closing the last request item.
8. Click **Assign DCN** to assign a document control number before you click either **Save & close request item** or **Back to request**. Once the request has been closed, it cannot be reopened to make changes or to assign DCN numbers.
9. Enter the DCN from the certificate. If you issued multiple certificates for this record, enter the first DCN in the series and click **Calculate**.
10. Click **Save & close request item** at the bottom of the page.
11. If you are exchanging multiple certificate types, click **Back to request** at the top of the page.
12. Click **Fulfill** for the next request item in the table.
13. Follow steps 4-10 until all request items are fulfilled.