

<b>Item</b>	<b>Topic</b>	<b>Task</b>
	CASCE Login	Log into CASCE and view an alert on the home page, notifying the number of new online registrations.
	Open OLR page	Click Online Registration on the left sidebar menu to open the OLR page.
	Select an OLR	Click the Event drop menu and select an event. Click the Person drop menu to display persons who registered for the chosen event. Select a person from the list. Click the Search button in upper right corner of page.
	Display the OLR	Registration information for selected person and event displays in a two-column list. Existing CASCE information (if any) for the selected person appears in the right column. Information entered by the customer during OLR appears on the left.
	Process the OLR	Compare the information in the two columns and use the customer-entered information to update and expand existing CASCE information. Research in CASCE when necessary to verify existing (or not) Person records, avoid duplicates, or resolve other questions about the information. See GAHEC guidance manual, particularly for avoiding duplicate Persons.]
		Transfer customer-entered information (left) to CASCE (right) by clicking on “>” between the two elements of information. Transfer a group of elements by clicking “>>” between the two groups of information. Transfer any special needs stated by customer in registration Comments box to Special Needs field or notify staff, as appropriate.
	CAUTION	If you encounter a problem, print the OLR screen and then notify your supervisor. It is not advisable to deny a registration in CASCE. The registration information can then only be retrieved by the NCAHEC Program Office.
	Approve OLR	When processing is complete, click the Approve button. After approval, a registration disappears from the list in CASCE OLR and immediately appears in Quick Registration.
	Check Person Page	Check the person’s Person page to assure correct transfer of all information from OLR registration. Note that occasionally “Markets” and “Occupation” do not transfer; e-mail preference (home vs. Office) is not shown, even though the e-mail address does appear. Check for other incongruities or deficits.
	Quick Registration	Click Quick Registration in the left sidebar menu to access the person’s registration that you just approved. Click the drop arrow beside the list of registrants and select the Person ID from the list. (OLR is indicated in parentheses beside the Person ID.)
		[SDS Dec 2, 2009--Although Greensboro uses this procedure, we are now uncertain why it is necessary. The PPM receipt_ID, Person_ID, and Event Number all automatically appear on the Receipt Page.

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		<p>On the Quick Registration page, copy the Event number, last name and last four digits of SS# from the bottom of the page in the Registration Comment box. Under “Payments for this Registration,” click the receipt number to display the Receipt page. On the Receipt page that displays, click the Edit button at page top. Delete the credit card transaction number in the Comment box and paste the Event number, last name and pid that you copied from Quick Registration. . [Note that “receipt type” is shown as “Credit Card (OLP).”] Click “Save Edit.”</p>
		<p>Click Quick Registration in the left sidebar to display the person’s registration. Click a session number (appears as a link) to open the session. Apply appropriate credits for the person. Reference the person’s credentials, discipline, or registration information to determine appropriate credits. Exit the Session page.</p>
	<p>Process OLR Cancellation in CASCE</p>	<p>Process cancellations to OLR registrations in CASCE by doing the following: In Quick Registration beside “Cancel,” click either “On Time,” “Late,” or “No Show.” At the prompt, click OK to confirm cancellation. Click on the Registration number (appears as a link) to open the Registration page, and click the Edit button. In the Comment box, explain the cancellation and note your identity. Click Save Edit button.</p> <p>Click the Payment number (link) to open the Payment page. Click the Receipt number to open the Receipt page. Click the Refund button. At the prompt, click OK. Enter the Person ID (lastName####) or Organization name to identify the payor. Click the Search button. In the list that displays, click the number beside the appropriate Person or Organization to select it. Enter the amount of refund at the prompt. In the Refund ID field, enter the credit card transaction number (or check request number, as appropriate). In the Comments box, identify yourself and add any other appropriate information. Click Save Add.</p> <p>To retain an “administration fee,” click the Event number (link) to open the Event page. Create and apply an administrative fee for 30% of the value of the registration being cancelled. Return to Quick Registration page and click the Select button beside the event fees field. In the popup window that opens, click Drop beside the current fee. (The popup window closes.) On the Quick Registration page, beside click Add and select the administrative fee. Near page bottom, under “Payment toward this Receipt,” click the Edit button to edit payment amount to the administrative fee. Click the Save button.</p>

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	Process OLR Cancellation in PPM	Process the refund in PayPal Manager by crediting 70% of the registration amount. To associate with the original charge, enter to Comment field the Event number, last name and pid from the bottom of the Quick Registration page in the Registration Comment box.
	Process Credit Card Transaction in Virtual Terminal	<p><b>NOTE:</b> Virtual Terminal processes credit card transactions and writes them to PayPal Manager, BUT it does not write registrations to CASCE. You must manually enter the associated CASCE registrations.</p> <p>Open Virtual Terminal in a browser.  <a href="http://www.aheconnect.com/registration/srahec/vt.asp">http://www.aheconnect.com/registration/srahec/vt.asp</a> Enter the following information: Your PayPal Username, Your PayPal Password, Amount, Credit Card Number (no spaces or dashes), Expiration Date, and Comment.</p> <p>Enter Comment as follows:</p> <ul style="list-style-type: none"> <li>• For receipts that will be entered to CASCE, record comment as “CASCE Event # - Person ID.” (example, 18024-smith1234)</li> <li>• For receipts that will <u>not</u> be entered to CASCE, enter comment as “contract name-payor name.” (example, EBP Contract-Durham Center)</li> </ul> <p>Define the transaction category by clicking to select “CE,” (Continuing Ed.) “TC” (Training Center), or “IAC” (Information Access Center).</p> <p><i>Optional, Not Required:</i> Complete the Additional Options Section to send e-mail confirmation of payment and/or registration. Under Receipt Information, enter the payor’s name (Received From), customer’s e-mail address. Under Course Confirmation, enter the CASCE Event ID and the attendee’s e-mail address(es). To enter multiple e-mail addresses, separate them by a semi-colon and space.</p> <p>Click the “Process Transaction” button. If you do not provide e-mail addresses, confirmations will not be sent. If you do not enter the CASCE Event ID, the event detail link (URL) will not be included in the confirmation.</p> <p>Transaction Details will display if the transaction was accepted. (An error message will display if data was input incorrectly or the credit card transaction was declined.) <b>IMPORTANT:</b></p> <ol style="list-style-type: none"> <li>1. Print the Transaction Details.</li> </ol>

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		<ol style="list-style-type: none"> <li>2. To clear the Transactions Details page and do another credit card transaction, click the link “Click Here to Process Another Transaction”.</li> <li>3. When the Transactions Details page is displayed, <b>DO NOT REFRESH</b> or press Enter key! Doing so will process a <u>second</u> transaction on this credit card!</li> <li>4. For VT receipts to be entered to CASCE, reference the Transaction Details to enter registration and payment/receipt information. See Quick Registration topic in this document for guidance.</li> <li>5. For receipts <u>not</u> entered to CASCE, write on VT Transaction Detail “Not CASCE Receipt” and either “CE,” (Continuing Ed.) “TC” (Training Center), or “IAC” (Information Access Center). Include Transaction Details with deposit reports to Admin/Finance. (For security, only partial credit card number is shown on Transaction Detail.)</li> <li>6. Include Transaction Details with receipt reports to Finance/Admin.</li> <li>7. Keep a daily log of VT transactions.</li> </ol>
	<p>Resolve and Report Credit Card Receipts to Finance</p>	<p>After processing OLRs, pull CASCE web query report of <u>Credit Card OLP</u> and <u>Credit Card Non-OLP</u> for the period processed.</p> <p>[In CASCE, Event&gt; QuickRegis&gt;click on Receipt# under Payments Toward Registr; Receipts page displays; select Related Views; select Receipts with Participant Info &gt;specify OLR, specify period, copy cells to Excel.]</p>
		<p>Browse to PayPal Manager at <a href="https://manager.paypal.com/">https://manager.paypal.com/</a> . Generate PPM report for same period. (PPM reports a day from midnight to 11:59 pm.) Copy activity list and summary of settlement report to Excel spreadsheet, formats, and prints.</p>
		<p>Compare and resolve CASCE OLR report and Virtual Terminal Transaction Detail reports with PPM report, accounting also for PPM credits (refunds) which are said not to appear in CASCE OLR reports. (Note that there is a small clock time lag between associated CASCE OLR and PayPal Manager transactions.)</p>
		<p>Add full documentation of credits (refunds) and approval to receipt reports.</p>
		<p>Compile all documentation behind a summary page that lists the receipt and refund subtotals for each transaction category (CASCE OLR, Virtual Terminal, Refunds) and the grand total.</p>
		<p>Submit all report items and summary page to Finance Admin, David Webb.</p>

SALES EXAMPLE -- CASCE OLR page (partial)

**Online Registration** for minich5104

Deny      Approve

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Registration for Event# 20606: Pulmonary Strategies for the Future (11/29/07 9:00 AM)  
 Event Fee: Early/Online fee (\$85.00)  
 More than one Session found for Event# 20606  
 Online Payment with amount of \$85.00 (\$85.00: Early/Online fee)  
 approved (approval code: MCHS: 895454121) at 11/07/07 9:21 AM

<b>OLR Buffer</b>		<b>Store/Update</b>	<a href="#">Refresh from Person record</a>
person_id:	<input type="text" value="minich5104"/>	>	<input type="text" value="minich5104"/>
salutation:	<input type="text" value="Mr."/>	>	<input type="text" value="Mr."/>
nickname:	<input type="text"/>	>	<input type="text" value="Tripp"/>
firstname:	<input type="text" value="William"/>	>	<input type="text" value="William"/>
mi:	<input type="text"/>	>	<input type="text"/>
lastname:	<input type="text" value="Minich"/>	>	<input type="text" value="Minich"/>
suffix:	<input type="text"/>	>	<input type="text"/>
degrees_certifications:	<input type="text" value="BS"/>	>	<input type="text" value="BS"/>
reporting_discipline:	<input type="text"/>	>	<input type="text" value="Other"/>
occupation:	<input type="text"/>	>	<input type="text" value="Other - Not Tracked / None"/>
sex:	<input type="radio"/> Male <input type="radio"/> Female <input checked="" type="radio"/> Unreported	>	<input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Unreported
wants_promotions:	<input checked="" type="radio"/> Yes <input type="radio"/> No	>	<input checked="" type="radio"/> Yes <input type="radio"/> No
mail_goes_to:	<input checked="" type="radio"/> Home <input type="radio"/> Office	>	<input checked="" type="radio"/> Home <input type="radio"/> Office <input type="radio"/> Unreported
home_address1:	<input type="text" value="1216 Grayland Street"/>	>	<input type="text" value="1216 Grayland Street"/>
home_address2:	<input type="text"/>	>	<input type="text"/>
home_city_state_county:	<input type="text" value="Greensboro NC"/>	>	<input type="text" value="Greensboro NC Guilford"/>
home_zip:	<input type="text" value="27408"/>	>	<input type="text" value="27408"/>

(lower portion of page not shown)

### SALES EXAMPLE – PayPal Manager Login



## Manager Login

Your session has expired. Please login again.

Leave the Users field blank if you are logging in for the first time, or if you do not have additional users set up.

\* Required Field

\* Partner:

\* Merchant Login:

User:

\* Password:

[Forgot your password?](#)

### SALES EXAMPLE – PayPal Manager Account Page



[PayPal.com](#) | [Documentation](#) | [Downloads](#) | [Support](#) | [Log Out](#)

[Home](#) | [Account Administration](#) | [Service Settings](#) | [Search Transactions](#) | [Virtual Terminal](#) | [Reports](#) |

November 07, 2007 06:28 AM

Welcome, minicht1

**Alerts**  
No Alerts

#### Business Activity Center

##### Transaction Activity

[Total Business Summary for Wednesday, 11/07/2007 \\*](#)

[Settled & Unsettled Transactions for Tuesday, 11/06/2007 \\*](#)

\* Available data is only for live transactions.

#### Message Center Alert Archives

No Messages

#### Your Account Status

**Name:** The Greensboro AHEC

**Email:** tripp.minich@mosescorp.com

**Status:** Your account is currently in **ACTIVE** status. You can run both **live and test** transactions.

#### Service Summary

Service	Status	Mode
<a href="#">PayFlow Pro</a>	Live	--

**SALES EXAMPLE – PayPal Manager Transaction Detail**

<b>Transaction ID:</b> VSJE1D063F6D	<b>Result Code:</b> 0
<b>Timestamp:</b> Nov 06, 2007 18:54:03 PM	<b>Response Message:</b> Approved
<b>Transaction Type:</b> Sale	<b>Authorization Code:</b> 540369
<b>Tender Type:</b> Visa	<b>AVS Street Match:</b>
<b>Credit Card Number:</b> 4828XXXXXXXXX2044	<b>AVS Zip Match :</b>
<b>Credit Card Expiration:</b> 08 / 2011	<b>International AVS Indicator:</b> N
<b>Amount:</b> 85.00 USD	<b>Card Security Code Match:</b>
<b>Tax Amount:</b> 0.00 USD	<b>ABA #:</b>
<b>Shipping/Freight Amount:</b> 0.00 USD	<b>Cust Ref #:</b>
<b>Duty Amount:</b> 0.00 USD	
<b>Original Amount:</b> 0.00 USD	
<b>Original Transaction ID:</b> 0.00 USD	
<b>Balance:</b> 0.00 USD	
<b>Credit Card Expiration:</b> 0.00 USD	
<b>Amount:</b> 0.00 USD	
<b>Tax Amount:</b>	
<b>Shipping/Freight Amount:</b> 300	
<b>Comment 1:</b> 20062-weeks3551	
<b>Comment 2:</b> Online Registration	

Billing Information	Shipping Information
<b>Billing Address:</b> Rita Weeks	<b>Shipping Address:</b>

Transaction History					
Transaction ID	Timestamp	Transaction Type	Amount	Result	Details
VSJE1D063F6D	Nov 06, 2007 18:54:03 PM	Sale	85.00 USD	0	--

**SALES EXAMPLE – PayPal Manager Current Day’s Settled Transactions**

Here, AHEC account manager can generate a credit to refund a payment. PayPal generates confirmation of each transaction to the customer.

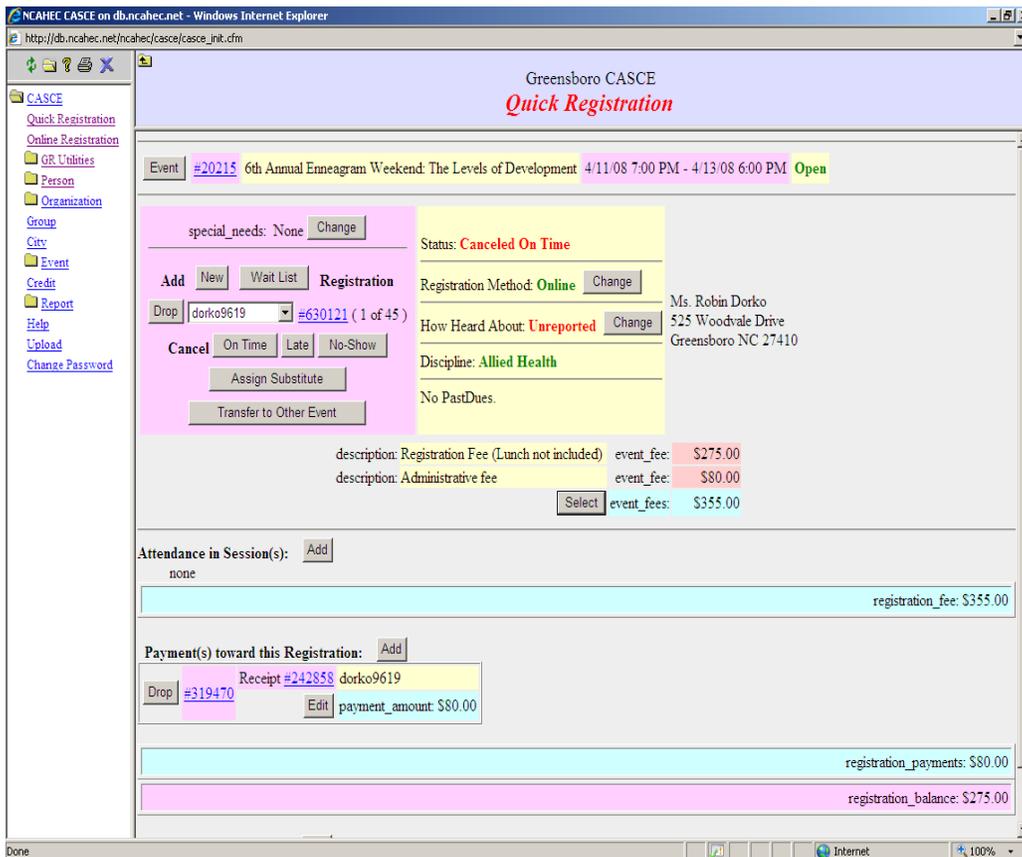
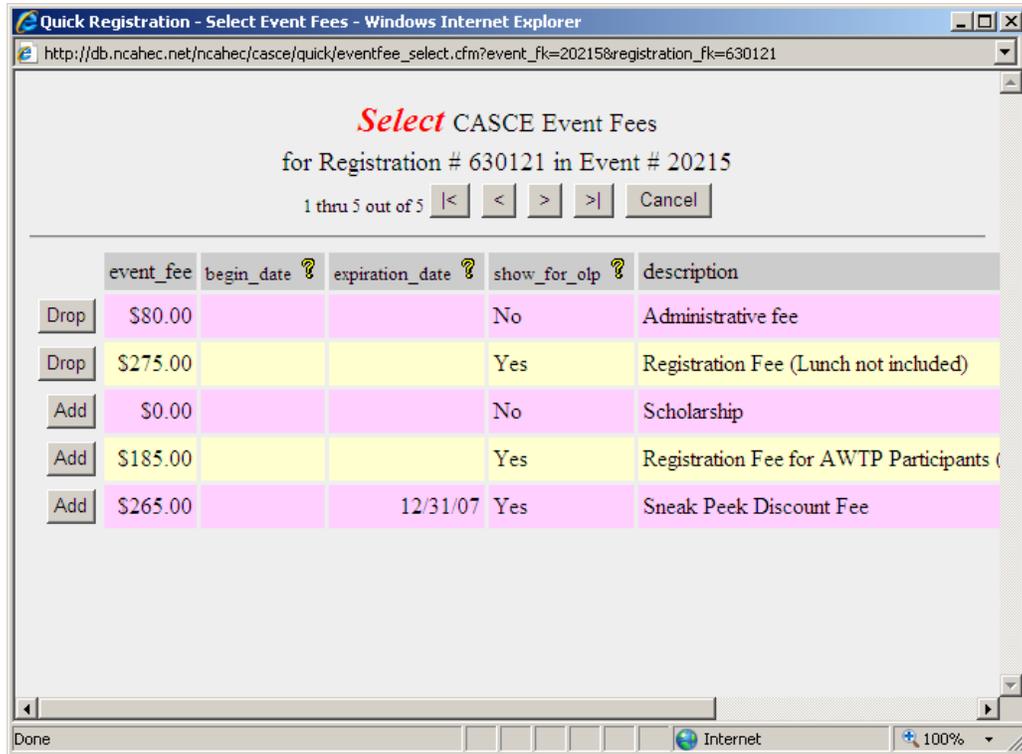
Date	Time Zone	Host Processor	Transaction Type	Settlement Status	Transaction Mode
Tue Nov 06, 2007 to Tue Nov 06, 2007	U.S. Pacific	VITA	All Settleable	Settled Transactions	Live

Download:

1-15 of 15 First | Prev | Next | Last

TRANSACTION ID	TRANSACTION TIME	TRANSACTION TYPE	CARD TYPE	ACCOUNT NUMBER	EXPIRATION DATE	CURRENCY	AMOUNT	RESULT	RESPONSE MSG	COMMENT1	COMMENT2	BATCH ID
<a href="#">VRCE1DD0E973</a>	Nov 6, 2007 4:15:33 AM	Sale	MasterCard	5403XXXXXXXXX3725	12/07	USD	90.00	0	Approved	19982-taylor9123	Online Registration	300
<a href="#">VTJE1D51976D</a>	Nov 6, 2007 6:15:48 AM	Sale	Visa	4118XXXXXXXXX3133	08/09	USD	35.00	0	Approved	15375-caber3970	AHEConnect Registration	300
<a href="#">VQCE1E4A9114</a>	Nov 6, 2007 6:59:38 AM	Sale	Visa	4118XXXXXXXXX3133	08/09	USD	35.00	0	Approved	15382-caber3970	AHEConnect Registration	300
<a href="#">VQEE1E4A9155</a>	Nov 6, 2007 6:59:54 AM	Sale	Visa	4003XXXXXXXXX1565	01/11	USD	99.00	0	Approved	20061-knox1524	Online Registration	300
<a href="#">VPFE1DA13F61</a>	Nov 6, 2007 7:06:07 AM	Sale	Visa	4003XXXXXXXXX1565	01/11	USD	275.00	0	Approved	20215-knox1524	Online Registration	300
<a href="#">VQCE1E4B101E</a>	Nov 6, 2007 8:40:42 AM	Sale	Visa	4744XXXXXXXXX2474	05/11	USD	35.00	0	Approved	15118-lake-carter4289	AHEConnect Registration	300
<a href="#">VQEE1E4B10DB</a>	Nov 6, 2007 8:41:20 AM	Sale	Visa	4661XXXXXXXXX9141	10/09	USD	50.00	0	Approved	20686-norris4340	Online Registration	300
<a href="#">VXJE1DF368B1</a>	Nov 6, 2007 9:53:32 AM	Sale	Visa	4275XXXXXXXXX2947	10/10	USD	35.00	0	Approved	15118-shelly9839	AHEConnect Registration	300
<a href="#">VUJE1DA4BC6C</a>	Nov 6, 2007 10:50:06 AM	Sale	Visa	4327XXXXXXXXX9375	05/10	USD	35.00	0	Approved	15118-fowler7344	AHEConnect Registration	300
<a href="#">VREE1DD3EB1B</a>	Nov 6, 2007 12:13:33 PM	Sale	Visa	4115XXXXXXXXX3100	02/10	USD	85.00	0	Approved	20446-maurer9475	Online Registration	300

**REFUND EXAMPLE -- CASCE**



Greensboro CASCE **Receipt** # 242858

person id: dorko9619

receipt\_ts: 1/30/08 1:40 PM

<i>This Receipt</i>	receipt_amount (\$):	275.00
<a href="#">Payment # 319470</a>	payment_amount (\$):	80.00 <a href="#">Event #20215</a> <a href="#">dorko9619</a>
<a href="#">Refund # 7882</a>	refund_amount (\$):	195.00 VRFE2A2F417A
	disbursements (\$):	275.00
	receipt_balance (\$):	0.00 <input type="button" value="Refund"/>

receipt\_id: OLR-VTGE1F67F877

receipt\_type: credit card (OLP)

budget\_code: 302C928

comment: 20215-dorko9619 cannot attend 20215 request card be credited \$195 3/4/08 mlee.

last update: mlee casce 3/04/08 3:48 PM

Sorted by person\_id, organization\_name, address1, receipt\_ts ↕

Greensboro CASCE **Refund** # 7882

Receipt # 242858 person id: dorko9619

receipt\_ts: 1/30/08 1:40 PM

refund\_ts: 3/04/08 3:50 PM

	receipt_amount (\$):	275.00
Payments	total (\$):	80.00
Supports	total (\$):	0.00
Other Refunds	total (\$):	0.00
other disbursements (\$):		80.00
<i>This Refund</i>	refund_amount (\$):	195.00 For Entire Receipt
	receipt_balance (\$):	0.00

refund\_id: VRFE2A2F417A

comment: dorko9619 cannot attend 20215 request card be credited \$195 3/4/08 mlee.

last update: mlee casce 3/04/08 3:51 PM

Sorted by person\_id, organization\_name, address1, receipt\_ts ↕, refund\_ts ↕

## REFUND EXAMPLE -- PayPal Manager Transaction Detail

PayPal Manager - Windows Internet Explorer

https://manager.paypal.com/performSearchTransaction.do?searchType=transID&searchTypePP=partialEmail&firstName=&e

Identified by VeriSign

File Edit View Favorites Tools Help

Google G Go 52 blocked Check AutoLink AutoFill Send to Settings

PayPal Manager

View Transaction Status

**Information for Transaction ID: VRFE2A2F417A**

**Information for Paypal Transaction ID:**

**Transaction Result Details**

<b>Transaction ID:</b> VRFE2A2F417A	<b>Result Code:</b> 0
<b>PayPal Transaction ID:</b>	
<b>Timestamp:</b> Mar 04, 2008 12:50:30 PM	<b>Response Message:</b> Approved
<b>Transaction Type:</b> Credit	<b>Authorization Code:</b>
<b>Tender Type:</b> MasterCard	<b>AVS Street Match:</b>
<b>Credit Card Number:</b> 5490XXXXXXXX2596	<b>AVS Zip Match :</b>
<b>Credit Card Expiration:</b> 06 / 2009	<b>International AVS Indicator:</b>
<b>Amount:</b> 195.00 USD	<b>Card Security Code Match:</b>
<b>Tax Amount:</b> 0.00 USD	<b>ABA #:</b>
<b>Shipping/Freight Amount:</b> 0.00 USD	<b>Cust Ref #:</b>
<b>Duty Amount:</b> 0.00 USD	
<b>Original Amount:</b> 275.00 USD	
<b>Original Transaction ID:</b> <a href="#">VTGE1F67F877</a>	
<b>Batch ID:</b> 416	
<b>Purchase Order Number:</b> VTGE1F67F877	
<b>Customer Code:</b> dorko9619	
<b>Supplier Reference #:</b>	

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**Comment 1:** 20215-dorko9619

**Comment 2:** Online Registration

<b>Billing Information</b>	<b>Shipping Information</b>
<b>Billing Address:</b> Robin Dorko	<b>Shipping Address:</b>

Done Internet 100%