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# Getting Started

## Logging In

1. You will have received an email from [contact@hscloudsuite.com](mailto:contact@hscloudsuite.com) and the subject of the email will be *HSCloud Temporary Password Set* with your temporary password to get started in the system.
2. Open your internet browser and go to: [cloud.healthspace.com](https://cloud.healthspace.com)

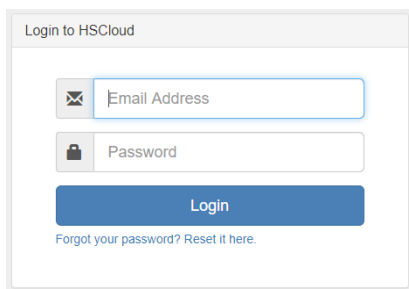
Bookmark this link so you have it easily available to get into your system. You can also create a shortcut to your desktop. Here are the instructions in Chrome to create a shortcut (but you can search online to get instructions for any browser you are using):

- i) Navigate to your favorite **page** and click the three vertical dots in the upper right corner of the screen:

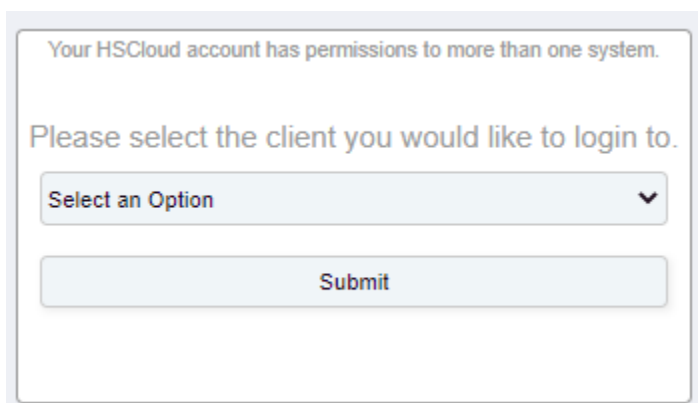


- ii) Select More tools.
- iii) Select Create **Shortcut**
- iv) Edit the **shortcut** name and click Create.

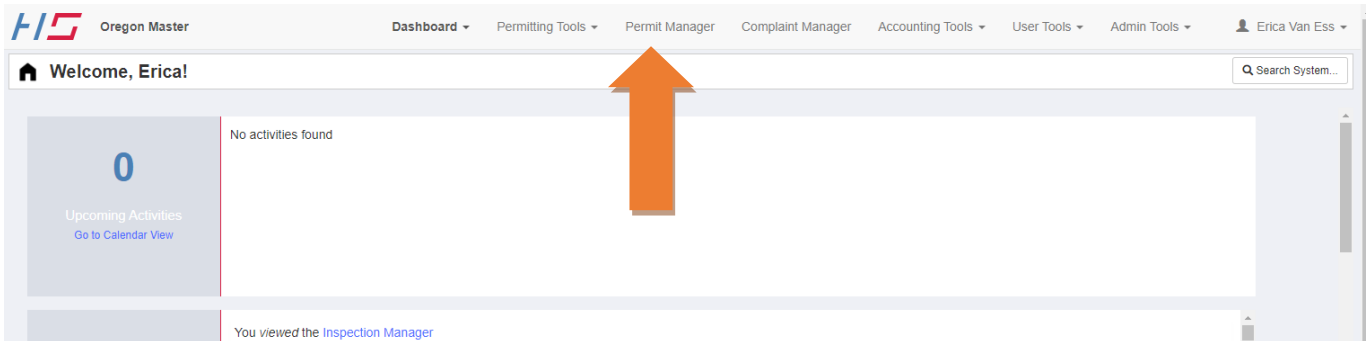
Then login with your email address and temporary password:

A login form titled "Login to HSCloud". It contains two input fields: "Email Address" with an envelope icon and "Password" with a lock icon. Below the fields is a blue "Login" button. At the bottom, there is a link: "Forgot your password? Reset it here."

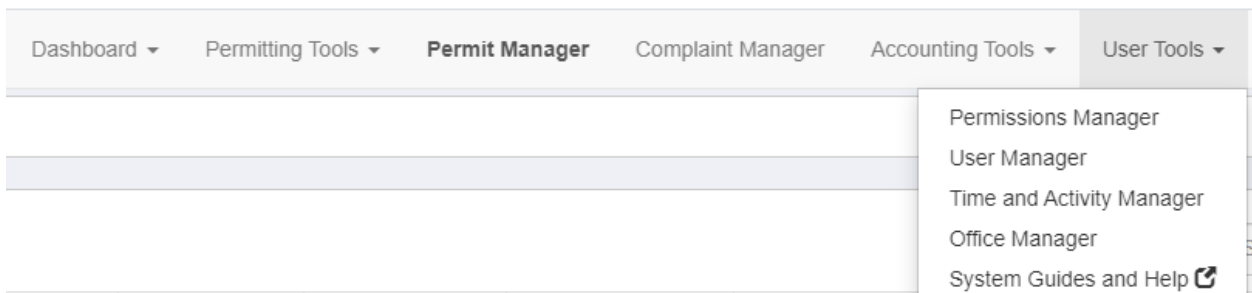
You will have a dropdown with the option to choose Oregon-Master (our testing db) or Oregon-YourCountyName, so pick your county name and click Submit to complete the login:

A screen with the heading "Your HSCloud account has permissions to more than one system." Below this is the instruction "Please select the client you would like to login to." There is a dropdown menu with the text "Select an Option" and a downward arrow. Below the dropdown is a "Submit" button.

3. Make sure your browser window is maximized so you can see the headers across the top of the page:

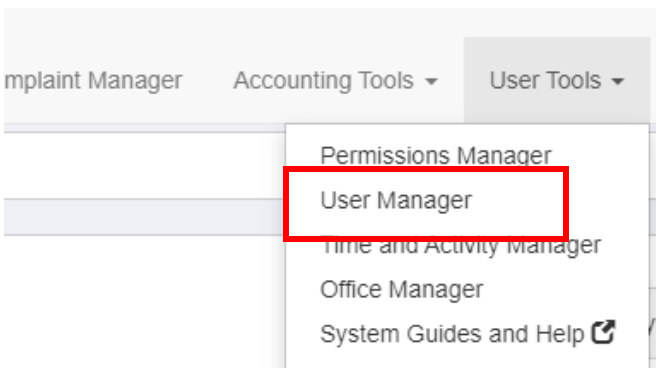


4. Under User Tools is access to the System Guides and Help



## Adding a Signature in System

1. From the top menu, select User Tools>User Manager



2. Double click on your name in the list, enter your Certification (REHS or REHST), office phone and then add your signature and click Save Changes.

*Note: You may see users in your system (like Erica Van Ess or HealthSpace staff) and those **should not be deleted**. They need to be users in your system so that they can help if you have any problems.*

# Overview of the System

## Definitions

**Back Button:** At the bottom of most pages. This will take you back to the manager screen. To go back a page, use the back arrow in your web browser instead.



**List Screen:** An example is the Permit Manager view that shows a list of all facilities in your jurisdiction:

Dashboard **Permit Manager** Complaint Manager Permit

**Permit Manager**

Filter Actions ▾

<input type="checkbox"/>	Facility Address	Facility Name	Status	Program	Owner
<input type="checkbox"/>	123 Erica Way Portland, OR 97232	Erica's Test Mobile	Permitted	Food	
<input type="checkbox"/>	123 Erica Way Portland, OR 97232	Erica's Test Org Camp	Permitted	Organizational Camp	Erica Owne Van E

**Save Button:** At the bottom of most pages next to the Back button. This will save and update the page.



## Reload:

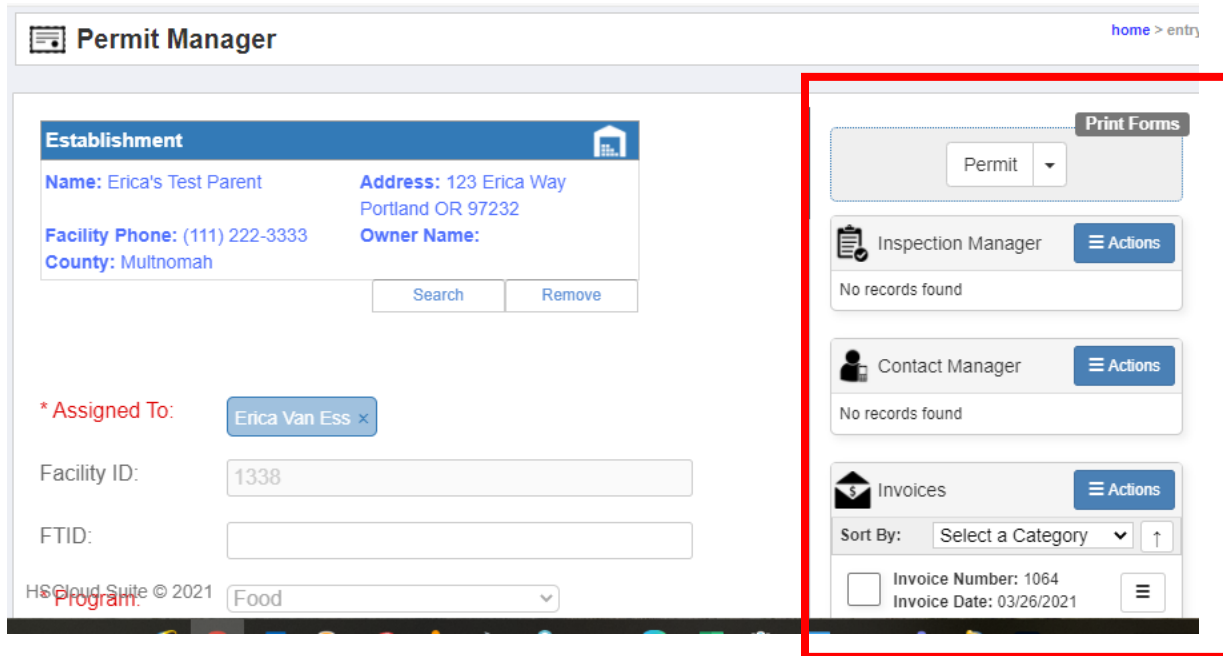
The boxes showing in the system where data is entered stored. Select the green plus to add information to these tables. The lightning bolt function is not being used in Oregon, so you can ignore it at this time. Ex: Email information in the Permit/Facility view:

Facility Email		
Recipient Email	Edit	Delete
erica.vaness@dhsosha.state.or.us		

This email address will receive letters, inspection reports and permits

**Workflow Panel:**

The list of information on the right-hand side of the Permit Manager facility view:



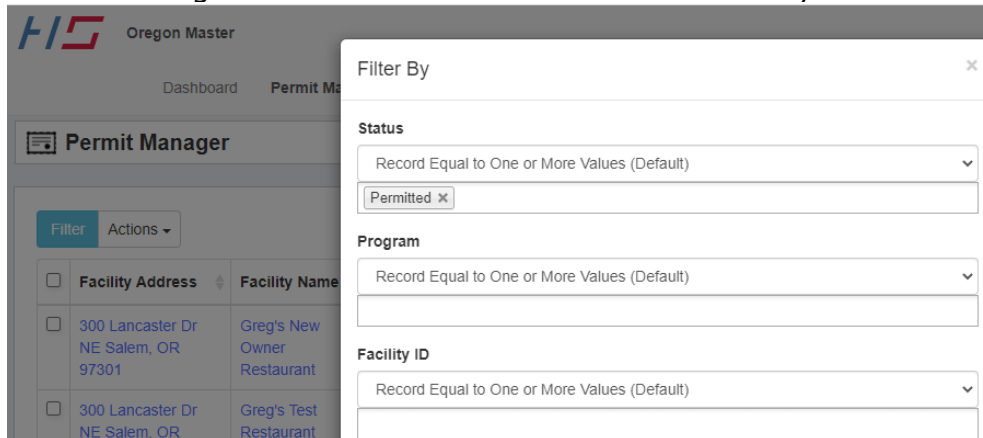
**List Screens**

**Permit Manager:** You will spend most of your time in the Permit Manager. It is the best place to manage your facilities for your day to day activities.

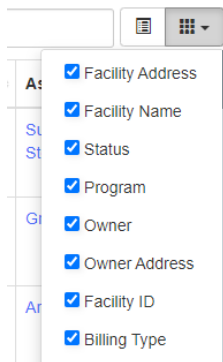
**Setting preferences for how you would like your list screens to look**

You can set the filter in the Permit View as a default for yourself or for your entire office if you all want to have the same default view:

Permit Manager>Filter button>Select the filter items you would like:



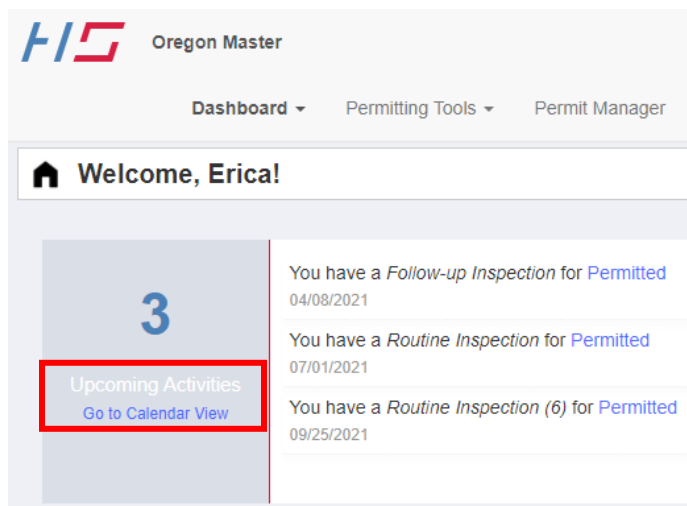
Also, you may want to see all the facilities and instead change the columns that you are seeing on the list screen. You can do this by unchecking any items in the list from the grid on the right hand side of the view:



## Inspection Schedule

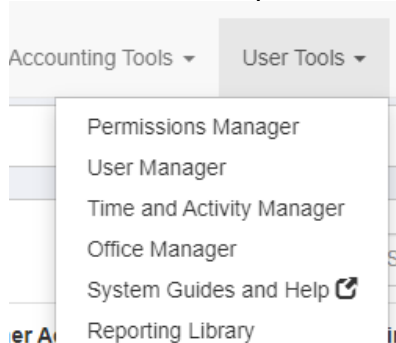
### Finding a scheduled inspection

The Dashboard view will show you upcoming activities as well as providing a link to your calendar to look at inspections that are due:

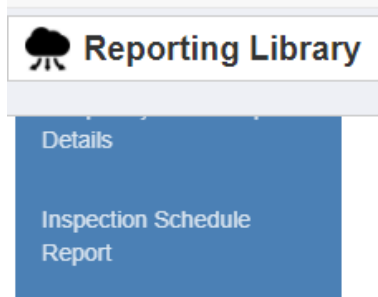


There are two ways to see your schedule, the canned report and in the Permit Manager:

1. Canned Report: Go to User Tools>Reporting Library:



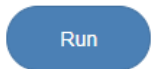
Scroll down to Inspection Schedule Report:



Enter some parameters and hit Run to generate the report.

**\*\*Note: If your county uses Inspector Assignment/Assigned inspector in Notes leave the Specialist at All\*\***

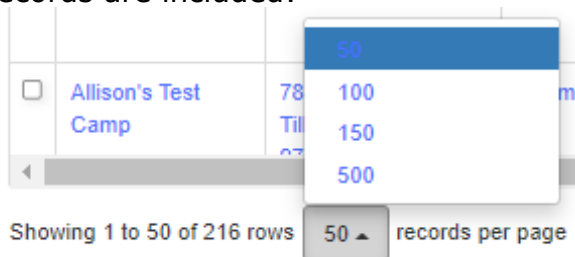
Scroll down the screen and you will see your report and you can export it into Excel by clicking the down arrow:



Specialist	Permit Name	Owner Name	Module	Billing Type	Last Routine Inspection	Next Routine Inspection Due	Follow Up Inspection Due	A
Erica Van Ess	Wienie Wagon	Jenifer Cameron	Food	Class 3 (Mobile-	05/01/2021	05/01/2021	05/15/2021	1 N

2. Permit Manager:

First click at the bottom left of the screen and increase the number to make sure all records are included:



Then go to the blue Filter button and enter parameters of what you want to see (in the example I selected Permitted and assigned to Erica so I would only see the active facilities that I inspect):

The screenshot shows the 'Permit Manager' interface. On the left, a table lists facilities with checkboxes. On the right, filter settings are applied: Status is 'Permitted', and Assigned To is 'Erica Van Ess'. Other filters for Program, Facility ID, and Billing Type are set to 'Record Equal to One or More Values (Default)'.

**\*\*Note:** If your county uses Inspector Assignment/Assigned inspector in Notes don't filter by Assigned to\*\*

- a. Click the box next to the files you want to export (or the box at the top to select all):

Next Routine Inspection Due > : 03/01/2021    Status EQUAL : Permitted    Assigned To EQUAL : Erica    Assigned To EQUAL : Van Ess

<input checked="" type="checkbox"/>	Status	Facility Name	Facility Address	Program	Owner	Permit Type	Assigne
<input checked="" type="checkbox"/>	Permitted	Erica's Test Org Camp	123 Erica Way Portland, OR 97232	Organizational Camp		Seasonal Organizational Camp (Seasonal Organizational Camp)	Erica Va

- b. Click on Actions and select Export Checked to Excel:

The 'Actions' dropdown menu is open, showing several options. 'Export Checked To Excel' is highlighted in blue. Other options include 'Export Checked To CSV', 'Export Entire Record Set To Excel', 'Save Filter as Default', and 'Print Checked'.



# Inspections

## Conducting an Inspection

1. From the top menu, select Permit Manager to see the list of all facilities in the system. Enter the first few letters of the facility name in the search box:

**Permit Manager**

Filter Actions

<input type="checkbox"/>	Status	Facility Name	Facility Address	Program	Owner	Permit Type	Assigned To	Next Routine Inspection Due	Permit Number
<input type="checkbox"/>	Permitted	Erica's Test Restaurant	123 Erica Way Portland, OR 97232	Food	Erica Owner Van Ess	Restaurant (0-15 seats)	Erica Van Ess	07/01/2021	1334

2. Click on the facility name to open the record and then click on Actions in the Inspection Manager box and select Add New Record to open a new inspection. You may want to select Add New Record in Tab so that it will open it in a new window:

**Permit Manager** home >

**Establishment**

**Name:** Erica's Test Restaurant **Address:** 123 Erica Way  
Portland OR 97232

**Facility Phone:** (111) 222-3333 **Owner Name:**

**County:** Multnomah

Print Forms

Permit

Inspection Manager Actions

No records found

[Add New Record](#)

[Add New Record in Tab](#)

3. Then find a restaurant and double click on the name to start an inspection. First you will pick the rules that match the facility type and click Continue:

\* Inspection Type: Food Restaurant and B&B 2020

Continue

4. This will open the inspection record. Add the date, your name as the Inspector and Semi-Annual as the Purpose:

\* Inspection Date:

\* Inspector:

Accompanied By:

\* Purpose:

5. Look at top of checklist to ensure it is the correct rule for the inspection (a Spa in this screenshot):

\* Purpose: Semi-Annual

Complaint

No records found

Create New Search

Spa 2014 Violations

6. Move through the inspection checklist

- For Restaurants, Mobile Units and Commissaries the first 27 items on the checklist is required and should be marked using the [Checklist Marking Instructions](#)
- For the OUT items, select the violation that applies and then enter specific violation and correction text.
- Items that are a repeat from the prior routine inspection will have a yellow triangle beside them that you can click on to see exactly what was cited previously:

Utensils, Equipment and Vending

45. Food & non-food contact surf. cleanable, proper design/constr/use

46. Warewashing facilities: installed, maintained, and used; test strips

If it is a true repeat, then select Repeat in the violation so it will double the score:

Utensils, Equipment and Vending - Observation

46. Warewashing facilities: installed, maintained, and used; test strips - OUT

Type:

Select an Option

Corrected During Inspection

Repeat

Corrected During Reinspection

- You can select both Repeat and Corrected During Inspection (if applicable) by holding down the Control key and clicking on both.
- If you need to pick multiple violations under one OUT checklist item click OUT, enter one violation, then click OUT again to enter a second violation in the same checklist category.
- To make violation boxes bigger, click in the box with the violation/correction text so you can see the whole text and then enter your specific comments:

Before clicking in Comments box:

3-301.11 P – Contamination from Employees Hands, RTE

Predefined  
Comments:  
VIOLATION OF SECTION 3-301.11 \*PRIORITY\* Food empl

Comments:  
VIOLATION OF SECTION 3-301.11  
\*PRIORITY\* Food employees do not

After clicking:

Predefined  
Comments:  
VIOLATION OF SECTION 3-301.11 \*PRIORITY\* Food empl

Comments:  
VIOLATION OF SECTION 3-301.11  
\*PRIORITY\* Food employees do not  
minimize contact with food in a ready-to-  
eat form, specifically.

- Informationals (Canned comments/99s) are at the bottom of the checklist:



*For food program inspections, it is helpful to hit Save Changes at the bottom of the screen after entering the checklist items, then again after entering all your equipment/temps and again after capturing the operator’s signature. This will ensure that your data is secure while you are getting used to the system.*

7. The box at the bottom for temperatures and equipment is called a “reload”

- Click on the plus sign to enter information. Do not use the blue lightning bolt icon, it is not something used for Oregon’s data.
- You can tab through the reload boxes to enter information

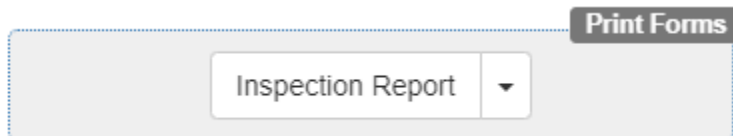
Food Temperatures				⚡	+
Food Item	Food State	Equipment Description	Temperature	Edit	Delete

- If you create an extra row on accident or if you need to edit values in a reload, you can delete/edit it by scrolling to the right and selecting the X icon to delete:



yanuric cid	Temperature	Calcium Hardness	Clarity Acceptable?	ORP	Flow Rate	Inlet Pressure	Outlet Pressure	Edit	Delete
50.00	102.00 °F	70.00	true		10.00 GPM	20.00 PSI	30.00 PSI		

- The reloads will be different for different type of facility inspections (ex: pool chemicals)
- Enter a person in charge name and signature.
- Enter an inspection Time In and Time Out
- Click Save Changes at the bottom of the form and it will take you back to the main Inspection Manager screen for the facility where you can print the inspection by clicking on the Inspection Report button in the upper right-hand corner of the view:




## Locking an Inspection

Inspections are locked when they are emailed. Emailed inspections can still be updated by the Local Administrator group in each system. Follow-up inspections are not locked until emailed.

- Once the inspection is complete and the email is sent to the facility, the inspection is now locked, and there are no longer options available to change violations on the inspections.
- A user with permissions to the Local Administrator group in their system will be responsible for making changes to an inspection that has been emailed and locked. All these changes will be recorded in record history.

## Conducting a Reinspection

- To start a reinspection, you can click on the reinspection on your schedule and it will take you directly to the facility record. Or you can go to the Permit Manager and open the facility there.
- Click on the gray box in the Inspection Manager and select Follow-Up from the dropdown list to start your reinspection.

**Establishment** 

**Name:** Erica's Test Restaurant      **Address:** 123 Erica Way  
Portland OR 97232

**Facility Phone:** (111) 222-3333      **Owner Name:**

**County:** Multnomah

Facility ID:

FTID:

© Cloud Suite © 2021

**Print Forms**

▾

**Inspection Manager**

Sort By:  ▾ ↓

**Inspection Date:** 03/25/2021

**Purpose:** Semi-Annual

**Outcome:** Complied

**Follow-up Required?**

- [Follow-up](#)
- [Edit](#)
- [Edit in Tab](#)

- The Date and Inspector should auto-populate. Make sure the Purpose is Reinspection.

 **Inspection Manager**

\* Inspection Date:

\* Inspector:

Accompanied By:

\* Purpose:

Then you can scroll through the list to find the items you marked out during your original inspection and Click the Edit icon on the right-hand side and change to Corrected During Reinspection:

Approved Source

09. Food obtained from approved source

Status: OUT  
Type: Violation

- Select the same violation and add new information under Corrective Actions after hitting return to separate it from the past comments:

Observation Details - OUT

Type:

Correct By Date:

Comments:

REQUIRED CORRECTION: CORRECT IMMEDIATELY. Food shall be obtained from approved sources. Food prepared in a private home may not be used in the establishment.

Corrective Actions:

- Do this for all violations until all are showing Corrected During Reinspection by the OUT of compliance item:

Supervision

01. PIC present, demonstrates knowledge, performs duties + IN + OUT

Status: OUT  
Type: Violation

---

Status: OUT  
Type: Corrected During Inspection

- Update the rest of the form, marked as Complied and click Save Changes.
- Print or email the inspection report by clicking on the Inspection Report button in the upper right-hand corner.

## Viewing a Historical Inspection

To view a historical inspection, go to Permit Manager and find the facility with the inspection you want to view.

Look at the Inspection Manager on the right hand side of the screen and click the “hamburger” (three bar icon) to the right and select Edit to open the inspection:

Print Forms

Permit

Inspection Manager Actions

Sort By: Inspection Date

<input type="checkbox"/>	Inspection Date: 05/11/2021 Purpose: Semi-Annual Outcome: Complied Reinspection Required?: N	☰
<input type="checkbox"/>	Inspection Date: 05/10/2021 Purpose: Semi-Annual Outcome: Complied Reinspection Required?: NO	☰

Follow-up  
Edit  
Edit in Tab

Then click the Inspection Report button in the top right on the screen and it will open the report in a new tab for viewing.

In CloudSuite we don't need to view the old inspections as often since the violation history shows on the current inspection report you are filling out. Just click on the number to the right of the violation and it will show you what was written for the past five routine inspections:

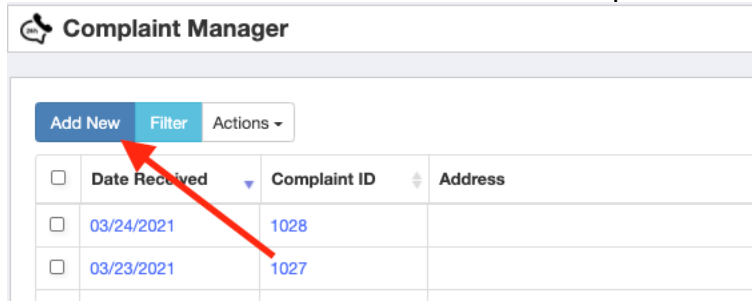
*Note: We cannot print historical inspections since all the print forms have changed, but can still open historical inspections and see all violations that were cited, etc.*

# Complaints

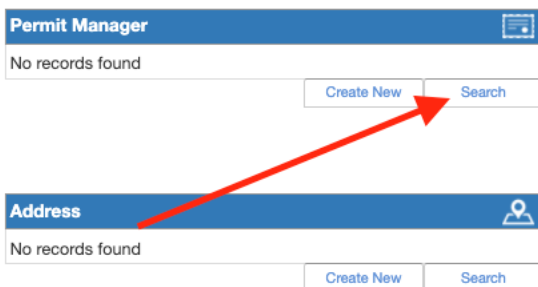
## Creating a Complaint

Starting Place: Complaint Manager

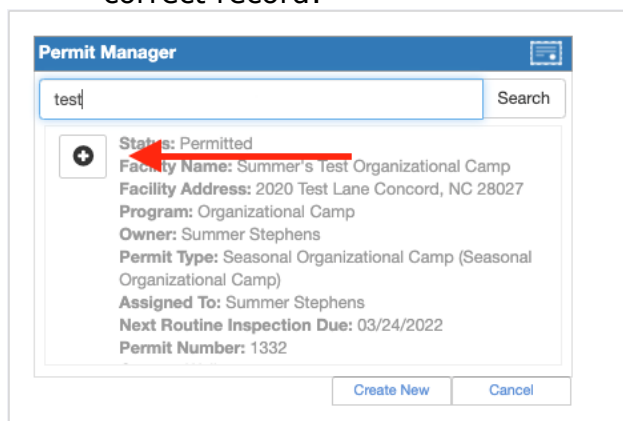
1. Click the Add New button in the top left corner:



2. Complaints will be tied to either a Permit for licensed facilities or an address for unlicensed facility complaints. For a licensed complaint, click the Search button under the Permit Manager box (skip to Step 4 for unlicensed facility complaints):

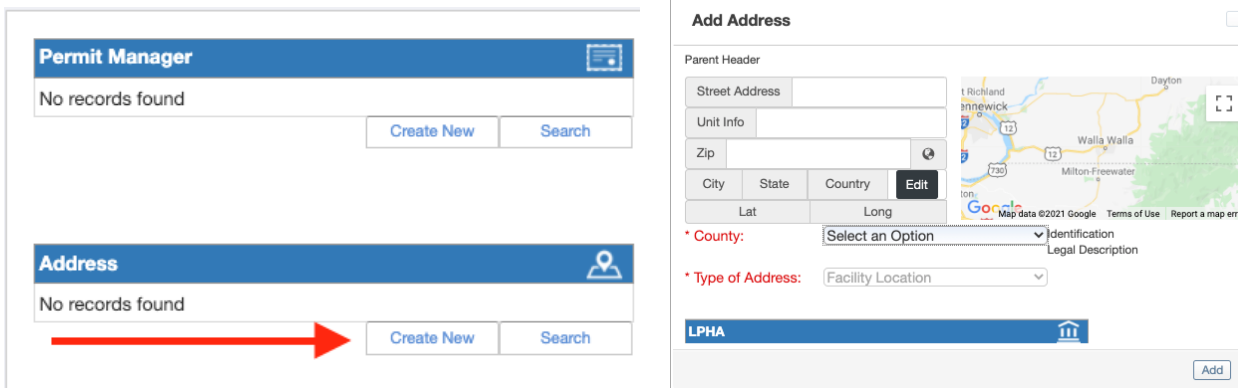


3. Search by Facility Name or Permit Number and click the + sign once you've found the correct record:

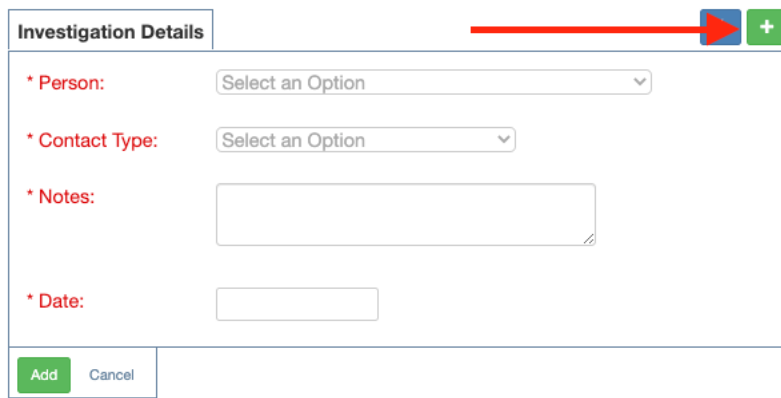




- For an unlicensed complaint, we will tie the record to an address by clicking Create New under the Address box. You will then fill out the address information in the Address Manager pop-up box that appears:



- Now you'll complete the fields for the complaint intake. Certain fields will appear/hide based on your selection in the Type field. Foodborne Illness Complaints have several additional fields for data collection.
- Investigation Details is a field that will track your contacts with a facility after receiving a complaint. You can add as many contact attempts as you need. To add a new contact attempt, click the green + on the Investigation Details box.



- Click Save Changes at the bottom of the page to save the Complaint. At this point, the complaint is established with an ID and can be viewed in the Complaint Manager list screen

## Creating a Complaint Inspection – Licensed Facility

Starting Place: Complaint Manager

1. Find your newly added complaint in the list screen and click on it.
2. Next, we want to open this record in the Permit Manager by click inside the Permit Manager box at the top. Click anywhere on the blue text :

**Complaint Manager**

**Permit Manager**

Status: Permitted      Facility Name: Summer's Test  
 Mobile Food Truck

Facility Address: 2020 Test      Program: Food  
 Lane Concord, NC 28027      Owner: Summer Stephens

Permit Type: Class 4 (Mobile-Has Commissary)      Assigned To:  
 Next Routine Inspection Due:  
 09/22/2021

Permit Number: 1328      County: Wallowa

Search      Remove

3. Once the record opens, click the Actions button on the Inspection Manager on the right side of the screen. Click Add New Record:

**Inspection Manager**      Actions

Sort By: [Dropdown]

Inspection Date  
 Purpose: Semi-Annual  
 Outcome: Corrective  
 Follow-up Required

- ➕ Add New Record
- ➕ Add New Record in Tab
- 🔄 Refresh
- 🖨️ Print Checked
- 🖨️ Print Checked Per Inspection
- 🖨️ View Recent Print Batches

4. Select the appropriate Inspection Type for this facility.
5. Select yourself as the inspector and change the Purpose field to Reinspection:

\* Inspection Date:

\* Inspector:

Accompanied By:

\* Purpose:

- ✓ Select an Option
- Semi-Annual
- Reinspection
- Annual
- Complaint
- Complaint - Unlicensed
- Consultation
- Pre-Opening
- Quarterly
- Temporary Restaurant
- Biennial
- Approved Alternative
- Semi-Annual Not Operating

Food School Violations

Supervision

01. PIC present, demonstrates knowledge

Employee Health

02. Management awareness; policy procedure

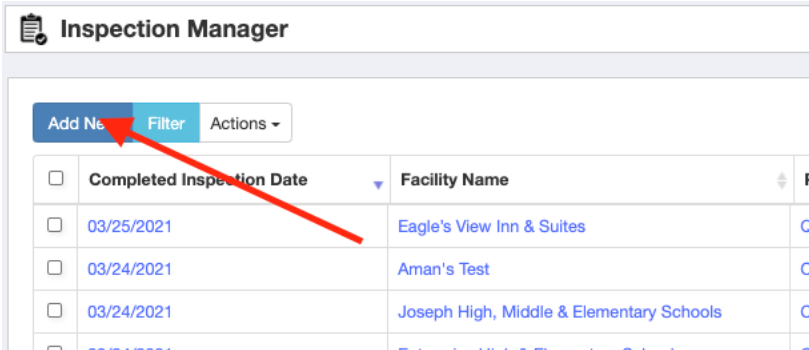
HSCloud Suite © 2021

6. Complete the inspection and click Save Changes at the bottom of the page.

## Creating a Complaint Inspection – Unlicensed Facility

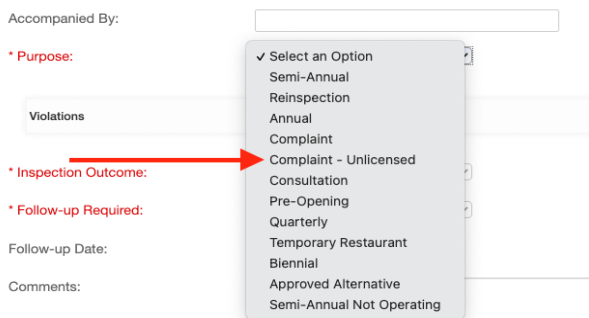
Starting Place: Inspection Manager (click Permitting Tools on top menu, then go to Inspection Manager)

1. Click the Add New button:

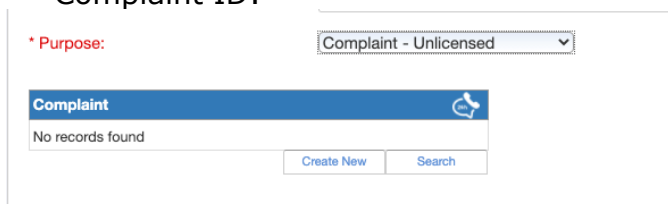


2. Since this is for an unlicensed complaint, we will not attach a permit. Assign yourself as the inspector.

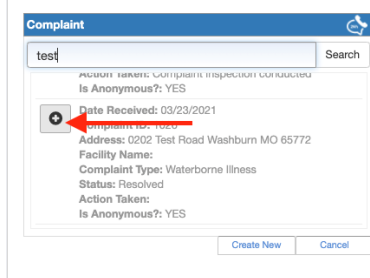
3. Under Purpose, select Complaint – Unlicensed:



4. When Purpose = Complaint – Unlicensed, a Complaint Search box will appear. Click Search and search for your unlicensed complaint by the Address of the complaint or the Complaint ID:



5. Click the + next to the appropriate Complaint record:

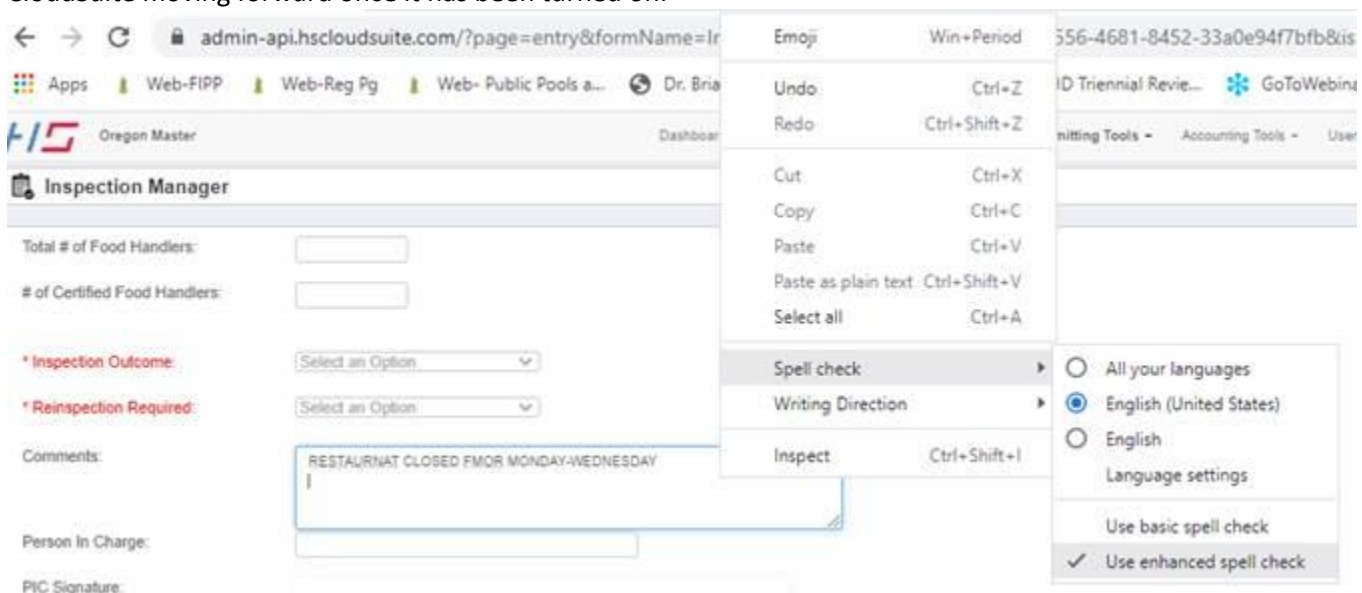


6. Enter inspection details in the Complaint Inspection Comments box.
7. Click Save Changes at the bottom once inspection is complete.

## Misc

### Spellcheck

Spellcheck of all caps is an option in Chrome that you can turn on! Just open an inspection and right click in one of the fields like Comments and select Spellcheck>Use Enhanced Spellcheck and it will underline misspelled words throughout CloudSuite moving forward once it has been turned on:





I have not been able to find an option for Edge or other browsers, but I will continue to look at other options.

### Contacting Support

If you have questions about CloudSuite or the HSTouch app:

Go to User Tools>Support: System Guides and Help:

ols ▾ Applications ▾ User Tools ▾

- User Manager
- Permissions Manager
- Time and Activity Manager
- Conversation Manager
- Office Manager
- Reporting Library
- Contact Report
- Reference Library
- Form Letter Library
- Form Letter Manager
- User Manuals and Videos 
- Support: System Guides and Help **

This will open a form to fill out that will post a ticket for your issue on the Monday.com Oregon Support Board and send an alert to OHA as well as HealthSpace.