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# Getting Started

## Logging In

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.

Open your internet browser and go to: <https://or.app.hscloudsuite.com/>

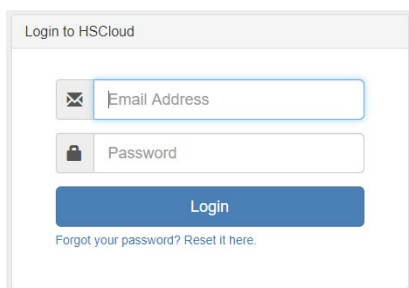
Bookmark this link so you have it easily available to get into your system. You can also create a shortcut to your desktop. Here are the instructions in Chrome to create a shortcut (but you can search online to get instructions for any browser you are using):

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

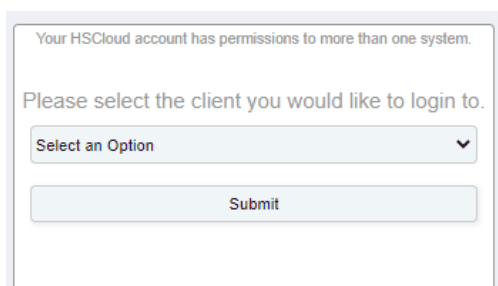


- ii) Select More tools.
- iii) Select Create **Shortcut**
- iv) Edit the **shortcut** name and click Create.

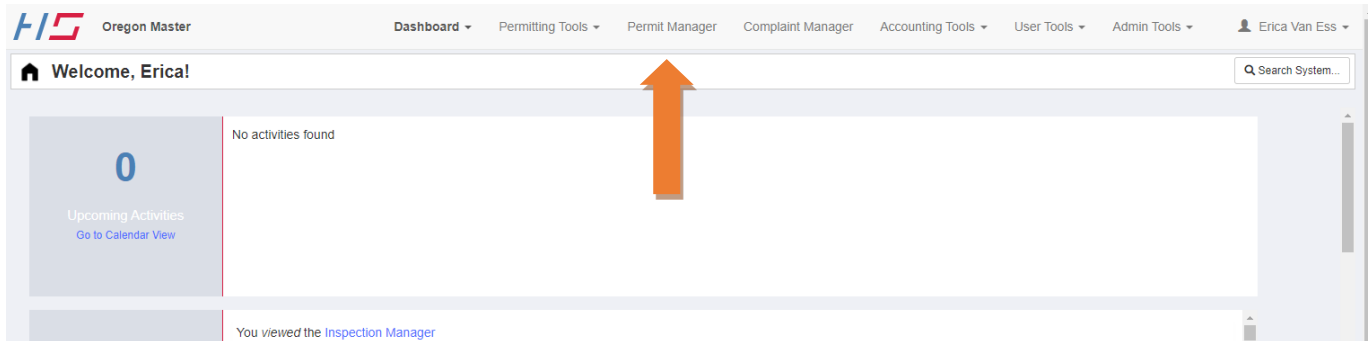
Then login with your email address and temporary password:

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."

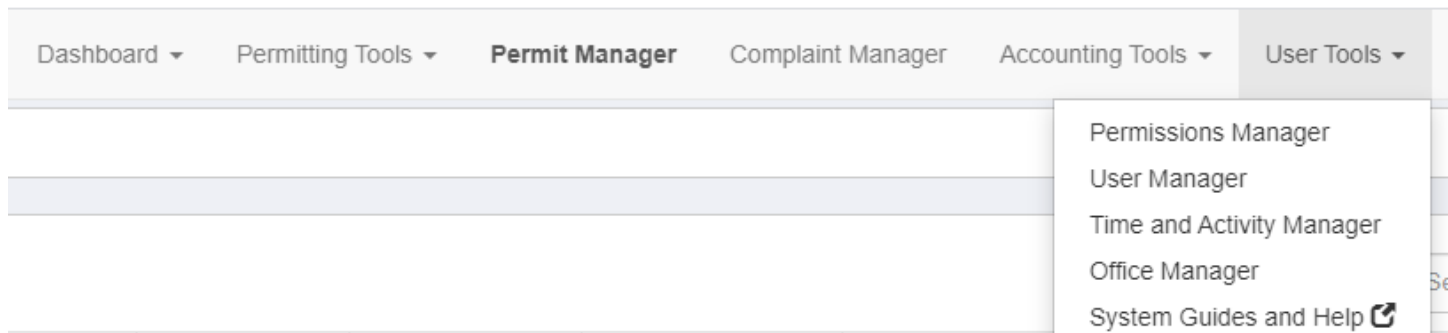
You will have a dropdown with the option to choose Oregon-Master (our testing db) or Oregon-YourCountyName, so pick your county name and click Submit to complete the login:

A form with a message: "Your HSCloud account has permissions to more than one system." Below it 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.

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



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



*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 (which usually is not what you want). It is recommended to use the back arrow at the top 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 <b>Permit Manager</b> 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 Own Van E

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



**Reload:**

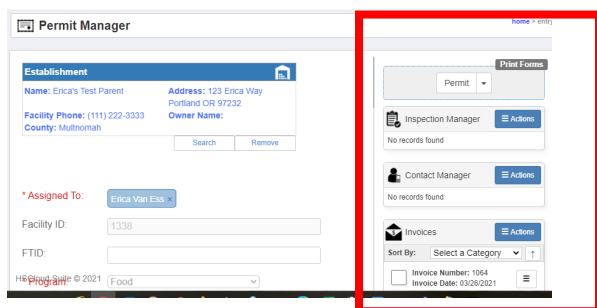
The boxes showing in the system where data is entered stored. Select the green plus to add information to these tables. The lightning bolt function is not being used in Oregon, so you can ignore it at this time. Ex: Email information in the Permit/Facility view:

Facility Email <span style="float: right;">⚡ +</span>		
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:

The screenshot shows the 'Permit Manager' interface with a 'Filter By' dialog box open. The dialog box has a title bar 'Filter By' and a close button 'x'. It contains three sections: 'Status', 'Program', and 'Facility ID'. Each section has a dropdown menu set to 'Record Equal to One or More Values (Default)' and a text input field. The Status section has a 'Permitted' tag with an 'x' icon. The background shows a table with columns for Facility Address and Facility Name, and two rows of data.

Facility Address	Facility Name
300 Lancaster Dr NE Salem, OR 97301	Greg's New Owner Restaurant
300 Lancaster Dr NE Salem, OR	Greg's Test Restaurant

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:

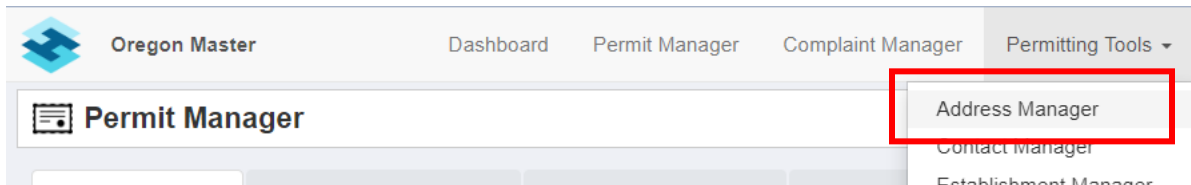
The screenshot shows the column selection menu in the Permit Manager interface. The menu is open, showing a list of columns with checkboxes next to them. All checkboxes are checked.

- Facility Address
- Facility Name
- Status
- Program
- Owner
- Owner Address
- Facility ID
- Billing Type

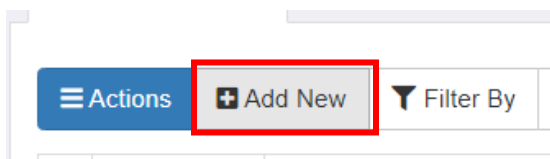
# Setting Up a New Facility

## Creating a New Physical Location (Parent)

1. From the top menu, select Permitting Tools>Address Manager



2. Then select Add New to create a new physical location.



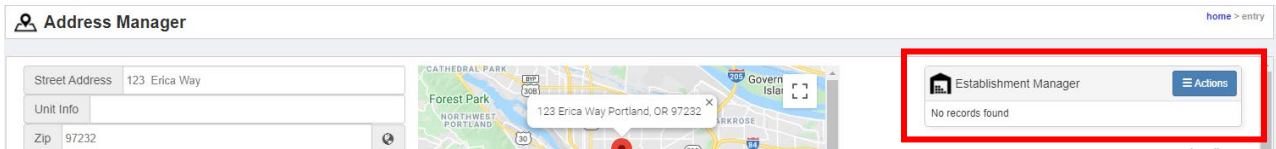
3. All mandatory fields have red flagged arrows; data must be entered in those fields. The LPHA must be your county/jurisdiction:

**Note: If the facility and owner have the same address, leave it set as the facility address when you add it to the owner record**

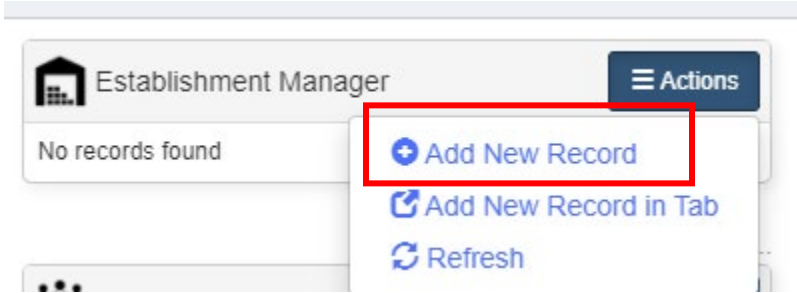
Click the Search button, type in your county and click the plus sign to the left of your county office as the LPHA.

Most of the lower fields on this page are optional, so you can populate as many as you want and then click Save Changes at the bottom of the page.

4. Now you will see a new box, Establishment Manager, appear to the right of your saved location:



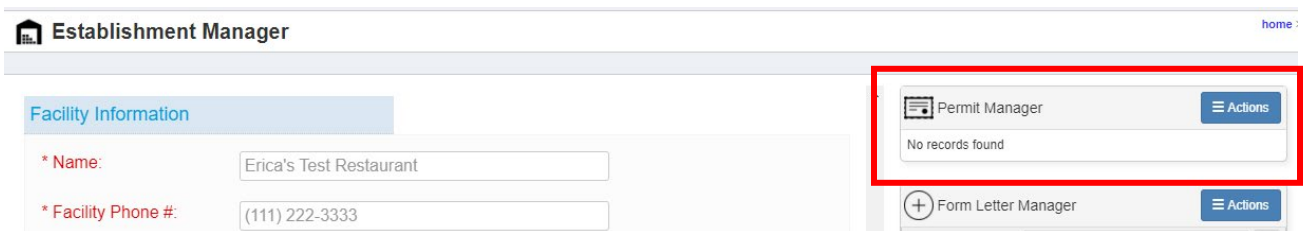
Click on the blue Actions button and select Add new record:



Enter the new Parent Facility Name and click Save Changes at the bottom of the screen:

A screenshot of the 'Facility Information' form. It has a blue header. Below the header are three input fields: '\* Name:' (with a red asterisk), 'Facility Phone #:', and 'Website:'. The 'Name' field is currently empty.

5. Now you will see that there is a Permit Manager box to the right of the screen:





6. Click on the Actions button and select Add New Record. This will prompt you to enter the billing information for the facility:

**Permit Manager**

\* Assigned To:

\* Facility Name:

Facility ID:

Legacy ID:

\* Program:

\* Billing Type:

\* Application Date:

Historical Application Date:

Issue Date:

Expiration Date:

\* Status:

\* Issuance Reason:

Facility ID will auto-populate after you save the record.

Go through the page entering information and add the email addresses in the Facility Email reload, by clicking the plus sign and assign the facility to the inspector before clicking Save Changes:

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

This email address will receive letters, inspection reports and permits

Maximum Seating capacity:

\* Does facility have an approved HACCP Plan or Variance?:   
If YES, attach document under attachments

Assigned To:

© Cloud Suite 2021

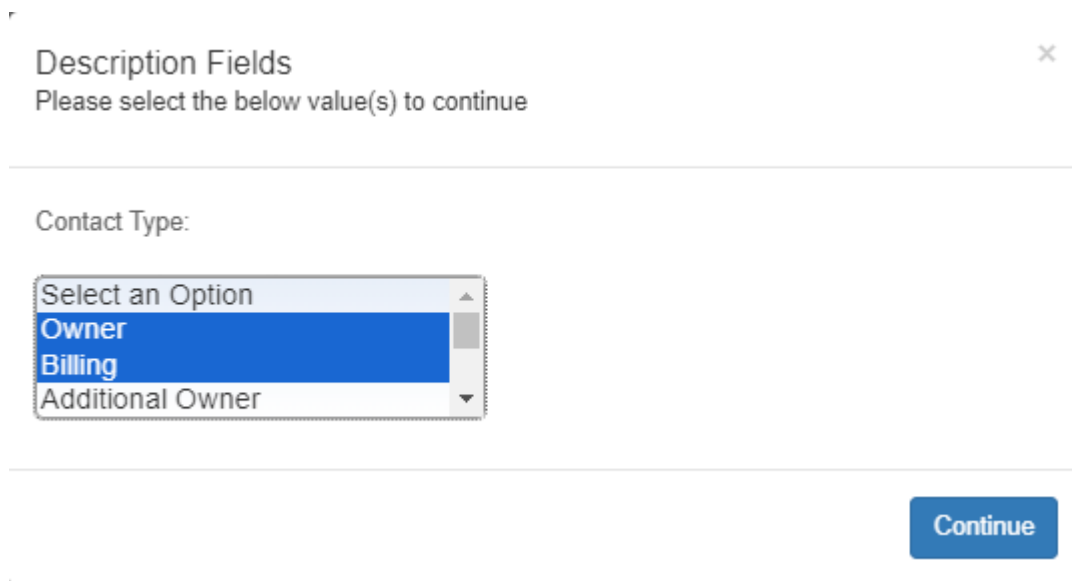
**Note:** The first three emails are the ones that can be used to email information. Additional emails can be stored in this reload box, but you will want to put the most important three at the top of your list.

- Next, we will populate the owner information in the Contact Manager on the right-hand side of the screen. First you should search to see if the owner has other facilities and/or is already in the system by clicking Actions>Search to Add and enter the first name of the operator and then try again with the last name:



If it doesn't return any records, then you will want to select Actions>Add new record instead and start entering them as a new owner.

- Here you have the choice to enter information for the Owner and the Billing Contact (if applicable). It will default to using the Owner information as the Billing information if you haven't populated the Billing Contact. Select Owner>Continue:

A screenshot of a dialog box titled 'Description Fields' with a close button (X) in the top right corner. Below the title is the instruction 'Please select the below value(s) to continue'. A horizontal line separates this from the 'Contact Type:' label. Below the label is a dropdown menu with the following options: 'Select an Option', 'Owner' (highlighted in blue), 'Billing', and 'Additional Owner'. At the bottom right of the dialog is a blue button labeled 'Continue'.

Only enter the Primary Contact Name if it is different than the Owner Name. When you get to the blue Owner Address box, first search for existing owners to make sure they aren't in the system. If they are not, select Create New:

**Contact Manager**

**\* Owner Name:**

Ownership Type:

**\* Title:**

Primary Contact Name:

**Owner Address**

No records found

**Add Address**


Street Address

Unit Info

Zip

Portland OR US

**\* County:**



Identification  
Legal Description

**LPHA**

Health District: Oregon Health Authority

Again, you will search on your county to populate the LPHA here.

## Managing Addresses in CloudSuite

The first thing to remember that in this system ALL addresses are in one place and can be tied to anything you would like. This is a good thing because if you need to change something with an address, it will change it throughout the system for every facility/person it is tied to, which is efficient (especially for new employees who may not know every facility owned by the same person, etc.). Secondly, you will rarely have a scenario where you would type over the top of an existing address, so don't do that without really thinking it through.

### Example 1 – Facility moves to new address:

If you have a mobile unit in a pod that moves somewhere else, you must remove the mobile unit (unlinking it from this address) and then search to add or add new to attach it to another. If

you just change the address, it will change it for all mobile units at that location since they have a shared address record.

First click Remove to disassociate the incorrect address from the facility:

The screenshot shows the 'Establishment Manager' interface. At the top, there's a header 'Establishment Manager'. Below it, the 'Address' section is active, displaying details for an address: '123 Erica Way, Portland OR 97232'. Other details include 'County: Multnomah', 'Water System Jurisdiction: Public', 'Sewage System Jurisdiction: Public', 'Physical Location Description: Tax Map Number: Water District:'. At the bottom of this section, there are three buttons: 'Search', 'Remove', and 'Create New'. The 'Remove' button is highlighted with a red rectangular box. Below the address section is the 'Facility Information' section, which includes input fields for 'Name' (filled with 'Erica's Test Parent'), 'Facility Phone #' (filled with '(111) 222-3333'), and 'Website'.

Then Search to Add to look for the address you would like to attach. If you don't see it, then you may need to Create New. This will make sure that the establishment is properly attached to the correct address.

### Example 2 – Shared address between owner and facility:

An owner used to have the same address as the restaurant, but then they give you a new PO Box they want to use for billing. To fix this, you need to remove the existing address and then Search to add or Create new to put in the updated PO Box. Simply typing over the existing address will also change it for the facility and then you will see the PO Box for both the owner and the facility address (which will let you know that you did it incorrectly). Follow the procedure above in Example 1 to properly remove the attached address and then add a new address.

## Adding and Paying License Fee

*Note: If you've just added in a new contact/owner, clear your cache when you return to the Permit Manager before entering an invoice so that the system is refreshed with the new owner information included*

9. Creating an invoice will generate a record of what is owing so you can make the payment. Go to the Invoices box on the right-hand side of the view and select Add New Record:

The screenshot shows the 'Invoices' section of the software interface. At the top left, there's a dollar sign icon and the text 'Invoices'. To the right is a blue button labeled 'Actions'. Below this, it says 'No records found'. A dropdown menu is open, showing four options: 'Add New Record' (with a plus icon), 'Add New Record in Tab' (with a tab icon), 'Refresh' (with a circular arrow icon), and 'View Recent Print Batches' (with a printer icon). Below the dropdown, there's a '+ Form Letter Man' button and a 'Sort By:' dropdown menu.

10. Enter the Invoice Date (usually today's date) and a due date (today's date if they have already given you their payment), then click the plus sign to add fees:

Invoice Due (New Entry) Cancel

\* Invoice Date: 03/25/2021 Parent Account

\* Due Date: 03/25/2021 Account Owner:  
Erica Owner Van Ess  
Balance:  
\$0.00  
Address:  
123 Erica Owner Way Portland OR 97232  
Account Number:  
1363

**Fees**

Fee	Quantity	Amount	Reverse Comments	Reverse
				+

Select the applicable fee in the dropdown and then Click Add Fee:

**Fees**
+

**\* Fee:**

Restaurant (0-15 seats) () Annual - \$530

Quantity:

Amount:

Add Fee
Cancel

Then click the Save Invoice button:

**Fees**
+

Fee	Quantity	Amount	Reverse Comments	Reverse
Annual	1.00	530.00		↻

**\* Total**    \$ 530.00

**Amount Paid**    \$

**Balance**    \$ 530.00

\$0.00

**Address:**  
123 Erica Owner Way Portland OR 97232

**Account Number:**  
1363

Cancel
Save Invoice

Search

11. If you are posting a payment immediately, you can click the Make a Payment button in the upper right of the screen (the "magic pencil" in the bottom right corner of the Parent Contact box will work too). This will take you directly to the Payment screen:

Invoice Due  
12/31/2021

Cancel
Make Payment
Save Invoice

**\* Invoice Date**  ✕ 📅

**\* Due Date**  ✕ 📅

**Fees**
+

Fee	Quantity	Amount	% Amount	Reverse Comments	Reverse
Class 4 (Mobile-Self-Contained)	1.00	255.00			↻

**Additional Fee**

**Notes**

**\* Total**    \$ 255.00

**Parent Account**

**Account Owner:**  
Naknakhone Chourirath

**Balance:**  
\$255.00

**Address:**  
PO BOX 455 Wallowa OR 97885

**Account Number:**  
1001

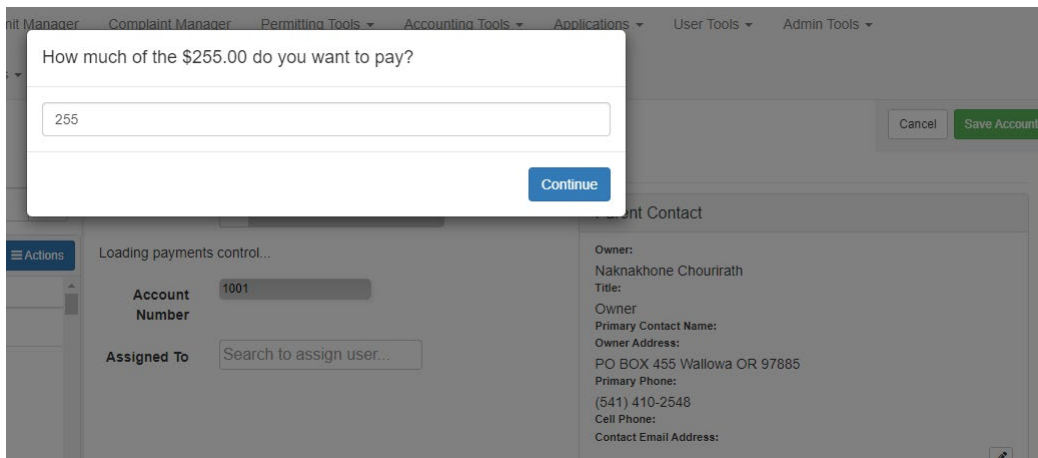
**Owner Email:**

Search

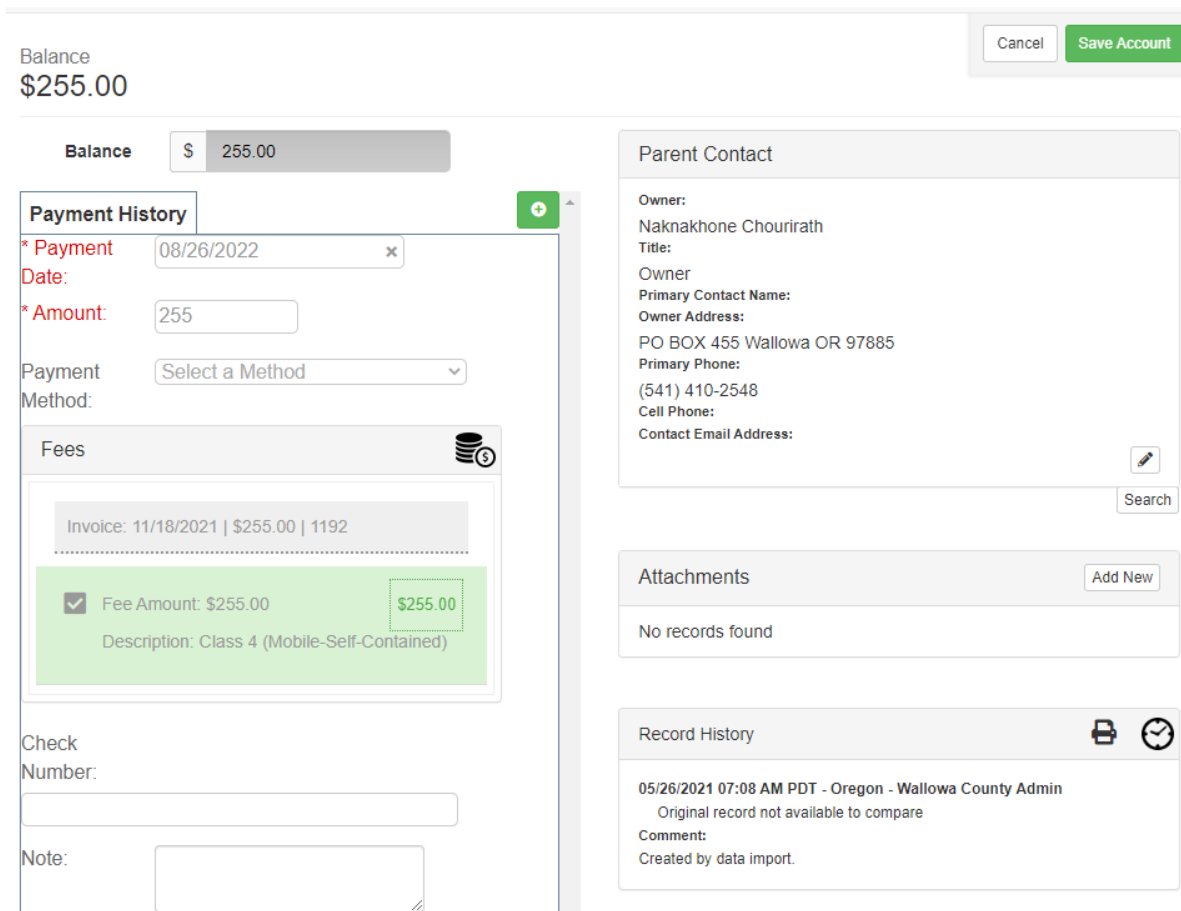
**Attachments** Add New

No records found

- When you click on this, it will take you to the payment view and ask how much you want to pay (it will default to the full amount):



- Leave it at the full amount or enter a different amount if they aren't paying in full. It will then apply it to the invoice, mark it green. You can fill in the Payment Method, Check Number and Note fields and select Save Account:



This different setup is what will allow you to pay multiple accounts with the same owner at the same time as well as print invoices for all facilities owing for that owner on one invoice.

14. Now click Save and you will see that a license payment has been applied and their balance is \$0:

Balance  
\$0.00

Balance \$ 0.00

Payment History

Payment Date	Amount	Payment Method	Check Number	Note	Rec. Num
03/25/2021	530.00	Check	1,234.00		1012

Parent Contact

Owner:  
Erica Owner Van Ess  
Title:  
Owner  
Primary Contact Name:  
Owner Address:  
123 Erica Owner Way Portland OR 97232  
Primary Phone:  
2223334444  
Contact Email Address:

Cancel Save

15. To print a receipt, scroll to the far right of the Payment History reload. Click the printer next to the payment and a PDF will generate that you print or attach to an email and send:

Balance  
\$0.00

Balance \$ 0.00

Payment History

Check Number	Note	Receipt Number	Reverse	Refund	Applied To	Print
12,345.00		1018	↺	↻	👤	🖨️

Another option to email a receipt is to go to:

- Payments>Reporting View, then click on the Facility you want to email to open their record.
- At bottom of screen there are icons for Printing or Emailing. Right now, you will need to manually add email address, but we have asked for a development ticket so it will auto-populate.
- HS is adding the owner email to Parent acct view that you see on this same screen so it will be easy to see for now.

16. To print the invoice, scroll all the way down the page and click on the Invoice to generate the form:

Invoice

📧 🖨️

## Entering a Prorated License Fee

This process is much simpler in CloudSuite than it was in Notes. All you need to do is select the routine annual fee for the facility and when it opens, just change the fee to ½ the amount and add it to the invoice. That's it!



Here is a screen shot of where you would change the fee amount and then hit the Add button and Save Invoice:

Invoice Due (New Entry)

Cancel Discard Draft Save Invoice

\* Invoice Date: 09/23/2021

\* Due Date: 09/23/2021

Fees +

\* Fee:

Restaurant (0-15 seats), Annual - \$530

Quantity: 1

Amount: 265

Add Fee Cancel

\* Total: \$ 0.00

Amount Paid: \$ 0.00

Balance: \$ 0.00

Parent Account

Account Owner:  
Erica Ovner Van Ess  
Balance:  
\$590.00  
Address:  
123 Erica Ovner Way Portland OR 97232  
Account Number:  
1363

Search

### Printing a License

17. From the top menu, select Permit Manager and open the facility. The option to print the permit is in the upper right-hand corner of the view:

Permit Manager

home > entry

Establishment

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

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

County: Multnomah

Search Remove

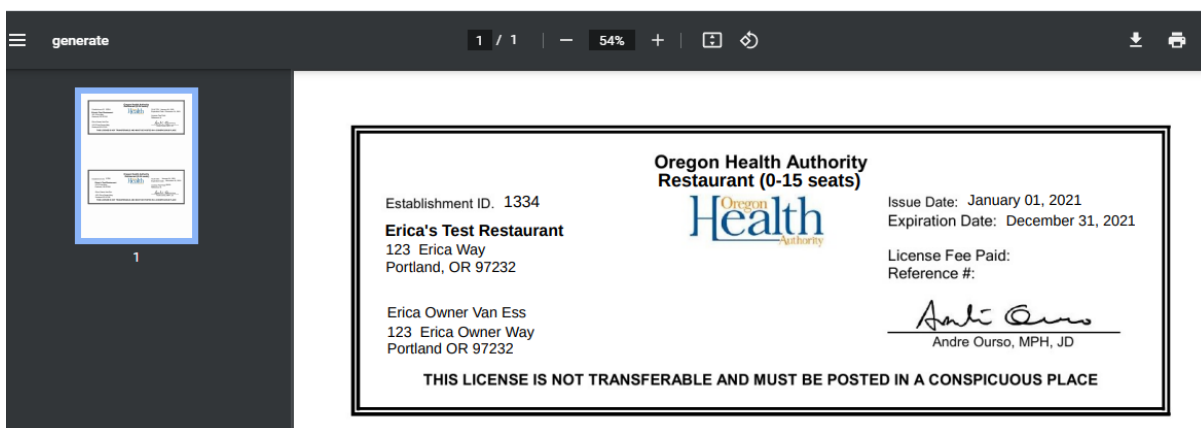
Permit

Inspection Manager

No records found

Actions

Which will generate the printable view of the license:



## Closing a Facility

Change the Status to Out of Business here and enter a closed date:

The screenshot shows the Permit Manager form with the following fields:

- Assigned To:** Erica Van Ess
- Facility Name:** Erica's Test Restaurant
- Facility ID:** 1334
- Legacy ID:**
- Program:** Food
- Billing Type:** Restaurant (0-15 seats)
- Application Date:** 03/25/2021
- Historical Application Date:**
- Issue Date:** 01/01/2021
- Expiration Date:** 12/31/2021
- Status:** Out of Business

This will automatically reverse any unpaid invoice fees for the facility as well.

## Change of Ownership

1. Select your facility record in the Permit Manager. You can easily find it by using the search box:

The screenshot shows the Permit Manager table with a search box containing 'Summer'. A red arrow points to the search box. The table has the following columns: Status, Facility Name, Facility Address, Program, Owner, Permit Type, Assigned To, Next Routine Inspection Due, Permit Number, and County.

Status	Facility Name	Facility Address	Program	Owner	Permit Type	Assigned To	Next Routine Inspection Due	Permit Number	County
Pending	Summer's High School	2020 Test Lane Concord, NC 28027	School	Summer Stephens	School (School)		09/22/2021	1329	Wailowa
Permitted	Summer's Test Water Works	2020 Test Lane Concord, NC 28027	Pool/Spa	Summer Stephens	Year-round Pool (First, Limited Use)	Summer Stephens	01/01/2021	1330	Wailowa
Permitted	Summer's Test Mobile Food Truck	2020 Test Lane Concord, NC 28027	Food	Summer Stephens	Class 4 (Mobile-Has Commissary)		09/22/2021	1328	Wailowa

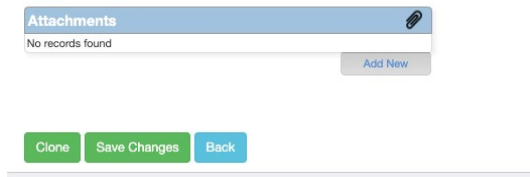
2. Change the Status of this record to "Out of Business"

The screenshot shows the Permit Manager form with the Status dropdown menu open. The menu options are:

- Select an Option
- Pending
- ✓ Permitted
- Out of Business
- Awaiting Additional Information
- COVID-19 Surveillance
- Fee Modification Pending
- Non-Sufficient Funds
- Surveillance
- Under Enforcement

The Issue Date is 01/01/2021. The Expiration Date is empty. The Status is Out of Business. The Issuance Reason is empty. The Risk is empty. The Inspection Frequency is empty. The Days Open is empty.

3. Scroll to the bottom of the page and click "Save Changes"



4. Next, click the "Clone" button next to Save Changes. If you don't want to use the Clone button, you can always create a new facility from scratch instead.
5. This will open your new permit (facility) form. Work your way down the page to update/edit all information to reflect the new facility's information.
6. Change the Status of this record to "Permitted" and change Issuance Reason to "Change of Ownership," if it is not already selected

The screenshot shows a form with several fields: '\* Issue Date:', '\* Expiration Date:', '\* Status:', and '\* Issuance Reason:'. The 'Status' and 'Issuance Reason' fields are circled in red. A dropdown menu is open for the 'Status' field, showing the following options: 'Select an Option', 'Pending', 'Permitted', '✓ Out of Business', 'Awaiting Additional Information', 'COVID-19 Surveillance', 'Fee Modification Pending', 'Non-Sufficient Funds', 'Surveillance', and 'Under Enforcement'. Below the form are fields for 'Risk:', 'Inspection Frequency:', and 'Days Open:' with a day selector (Monday through Sunday).

7. Once you've made the appropriate changes, scroll to the bottom, and select Save Changes
8. This is your new record. You'll notice it has its own Permit Number and that past Inspections/Owner Information has been cleared out
9. Go to the top left of the page and click on the Establishment (Parent) record and change the facility name there to match the name of the new facility and Save. Click the back arrow at the top of the page to get back to the Permit Manager again.
10. To add a new owner, go to the Contact Manager on the right side of the screen and click Actions. You can then click Add New Record if it's a new owner to the system or you can Search to Add if it's an existing owner

**Permit Manager** home > entry

Facility Phone: (111) 222-3333    Concord NC 28027  
 County: Wallowa    Owner Name: Summer Stephens

Facility ID: 1335  
 FTID:   
 \* Program: Food  
 \* Billing Type: Restaurant (16-50 seats)  
 \* Facility Name: Summer's Test Cafe Clone Example

- Inspection Manager Actions  
No records found
- Contact Manager Actions  
No records found
- Enforcement Action Manager Actions  
No records found
- Invoices Actions  
No records found

11. Lastly, click on the Establishment (Parent) record in the top left and change the Establishment name to match the name of the new facility.

## NSF Fees

1. First, reverse the payment for the facility, adding NSF in the Reason for Reversal:

Reverse Payment x

Reverse Date: 01/10/2022  
 Reverse Amount: \$430.00

\* Reason for Reversal:  
 NSF Check

Cancel    Reverse

Balance  
\$430.00

Balance \$ 430.00

Payment Date	Amount	Payment Method	Reversal Reason	Check Number
11/09/2021	430.00	Check	NSF Fee	

2. Go back to the existing invoice and add an NSF Fee or Random Fee (let Erica know if you need an NSF fee added to your system):

Invoice Due  
12/31/2021

\* Invoice Date: 10/28/2021  
 \* Due Date: 12/31/2021

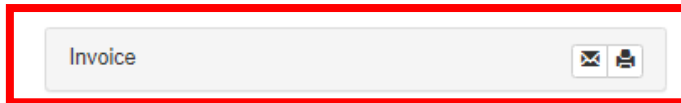
**Fees** +

\* Fee:  
 NSF Fee, Fee - \$25

Quantity: 1  
 Amount: 25.00

Add Fee    Cancel

3. Scroll to the bottom of the invoice screen to print/email new invoice to show license fee and NSF fee to send to operator:



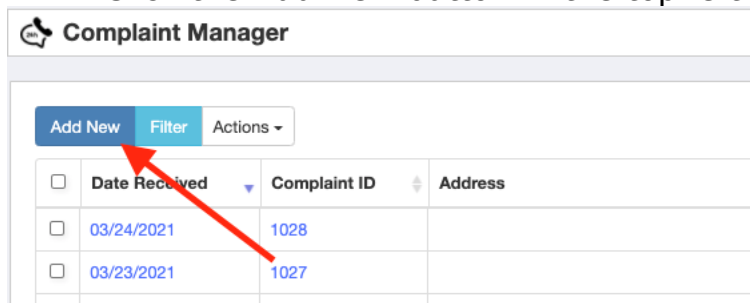
INVOICE DUE AND PAYABLE UPON RECEIPT	
Description	Amount
201451 - Random -	\$430.00
201451 - NSF Fee - Fee	\$25.00
<b>Total Due</b>	<b>\$455.00</b>

## 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)

**Permit Manager**  
No records found  
Create New Search

**Address**  
No records found  
Create New Search

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

**Permit Manager**  
test Search

+ Status: Permitted  
 Facility Name: Summer's Test Organizational Camp  
 Facility Address: 2020 Test Lane Concord, NC 28027  
 Program: Organizational Camp  
 Owner: Summer Stephens  
 Permit Type: Seasonal Organizational Camp (Seasonal Organizational Camp)  
 Assigned To: Summer Stephens  
 Next Routine Inspection Due: 03/24/2022  
 Permit Number: 1332

Create New Cancel

4. 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:

**Permit Manager**  
No records found  
Create New Search

**Address**  
No records found  
Create New Search

**Add Address**

Parent Header

Street Address  
Unit Info  
Zip  
City State Country Edit  
Lat Long  
\* County: Select an Option Identification Legal Description  
\* Type of Address: Facility Location

**LPHA**  
Add

5. You can also enter a Physical Location Description to help better identify the facility. This information will be displayed in the Complaints List Screen along with the Physical Address


**Add Address**

Lat: \_\_\_\_\_ Long: \_\_\_\_\_ Map data ©2021 Google Terms of Use Report a map error

County:  Identification  
Legal Description

\* **Type of Address:**

---

**LPHA** 

No records found

---

Physical Location

Description:

6. Now you'll complete the fields for the complaint intake. Certain fields will appear/hide based on your selection in the Type field. Be sure to pick the one topic that is most appropriate for the complaint. Foodborne and Waterborne Illness Complaints have several additional fields for data collection that will pop up when they are selected.

*Note: Make sure that Foodborne and Waterborne Illness complaints are not anonymous*

7. 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

**Investigation Details**

\* **Person:**

\* **Contact Type:**

\* **Notes:**

\* **Date:**

8. 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

**Temporary Event**

Name	Start Date	End Date	<input type="button" value="Search"/>
Southern Christmas Show	11/09/2017	11/19/2017	

**CLICK TO OPEN**

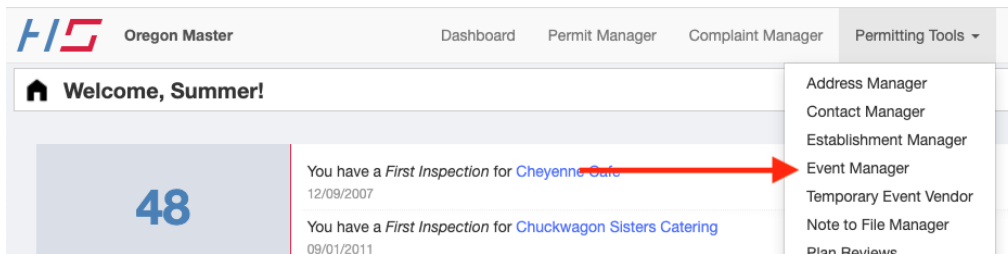
# Temporary Events

The module for Temporary Events and Vendors is separate from the main Permit Manager. To properly track an event and participants, you must first create the record for the event, and then you can set up the Temporary Event Permits that will tie to it.

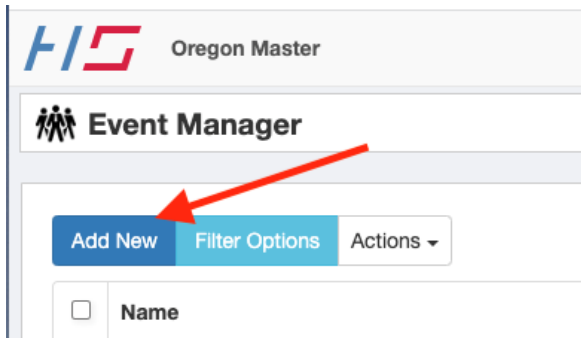
*Note: Events can still be cloned, but Vendors will not since you now tie multiple events to one Vendor.*

## Creating an Event

From the top menu, select Permitting Tools > Event Manager



Click the Add New button:



Under the Event Address, always search for an existing address first. If it isn't found, click Create New and enter a new facility/location address. Add the county, Type, your LPHA and any other information you want to track for the location and click Add at the bottom right.

A screenshot of the address entry form in the Oregon Master application. The form includes fields for 'Street Address' (800 NE Oregon St), 'Unit Info', 'Zip' (97232), 'City' (Portland), 'State' (OR), and 'Country' (US). There are also fields for 'County' (Wallowa) and '\* Type of Address' (Facility Location). To the right of the form is a Google Map showing the location of the address in Portland, OR. Below the form is a section for 'LPHA' (Local Public Health Authority) with a dropdown menu showing 'Oregon Health Authority - Food/Pool/Lodging' and 'Health Director Name: Andre Ourso, MPH, JD'. At the bottom of the form is a 'Physical Location Description' field with the text 'OHA Parking Lot'.



Fill in the information for your event, the Event coordinator, their cell phone, and sponsor information, if it applies:

\* Event Name:

Location Description:

\* Start Date:

\* End Date:

Expected Number of Vendors:

Event Hours:

Comments:

Contact Information

\* Event Coordinator:

Mailing Address:

\* Cell Phone:

Email:

Then assign the event to the appropriate inspector and click Save Changes:

Assigned To:

This will reload the page and add the workflow panels on the left allowing you to add vendors to the event.

## Creating a new Temporary Event Vendor

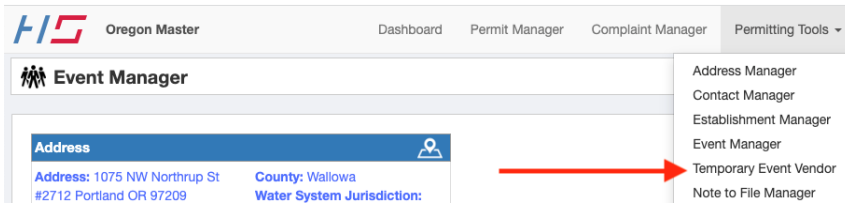
**Note: As you start using the updated (June 2022) temporary event module, HealthSpace recommends creating each vendor from scratch for the first time instead of using an older cloned version that may have come in from Notes. This will ensure you have all the fields you need to be able to properly use the new module functionality.**

*Additional Note: Do not modify/use the information in the upper left-hand corner. This is historical event info that will be removed at some point. Using the Event Manager in the workflow panel on the right (green star) is how this will work moving forward.*

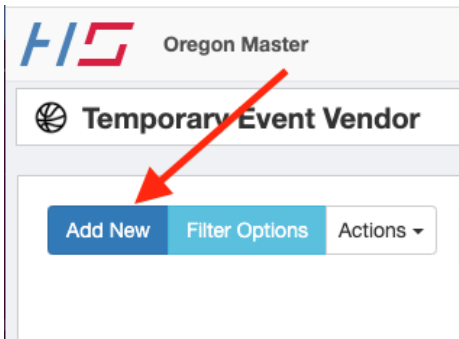
Here is an overview of the functionality of the updated Vendor view:

The screenshot shows the 'Temporary Event Vendor' interface. At the top left, there is a header 'Temporary Event Vendor' with a 'home' link. Below this is the 'Event Manager' section, which contains event details for '2022 Spring Fair' (Event ID: TEMP-1027) and a 'Permit' dropdown. A callout box points to this section, stating: 'Box from old version – will disappear at some point – historical info'. Below the event details is the 'Assigned To' field, currently showing 'Erica Van Ess'. The main section is 'Facility Information', which includes fields for Vendor ID (1025), Facility Name (Anna's Lemonade Stand Test), Status (Permitted), Application Date (03/26/2021), Billing Type (Benevolent), Facility Type (Single Event), Facility Description, Primary Phone Number ((111) 222-3333), and Facility Email (lemonade@lemonade.com). A callout box points to the Event ID field in the 'Event' section at the bottom, stating: 'Use the Event ID when Searching to Add for these boxes – quicker and more accurate.' On the right side, there is a vertical 'Workflow Panel' with several modules: 'Inspection Manager' (with a 'Permit' dropdown), 'Complaint Manager' (No records found), 'Event Manager' (with a 'Permit' dropdown and a list of events), 'Contact Manager' (Owner Name: Summer Stephens, Title: PIC/Manager), and 'Invoices' (No records found). A callout box with a green star points to the 'Event Manager' module in the workflow panel, stating: 'This box now holds all events tied to vendor – Search to Add all events here'. A red arrow points from the 'Event ID' field in the 'Event' section to the 'Event Manager' module in the workflow panel.

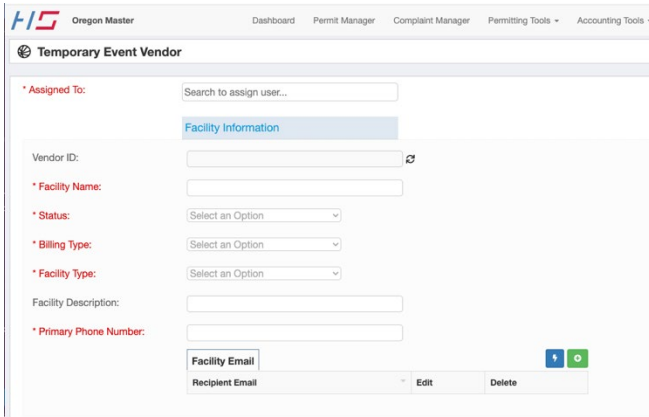
From the top menu, select Permitting Tools > Temporary Event Vendor



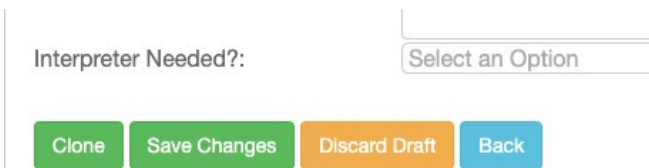
Click the Add New button:



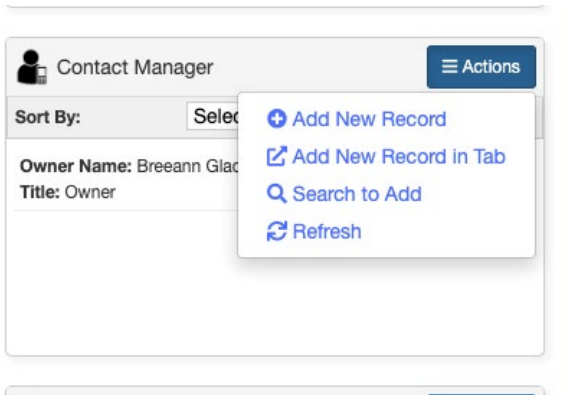
Fill in the Facility Information section for the vendor.



Scroll to the bottom (**skip over the other sections**) and click Save. This will reload the form and populate the workflow panels on the right side of the form.

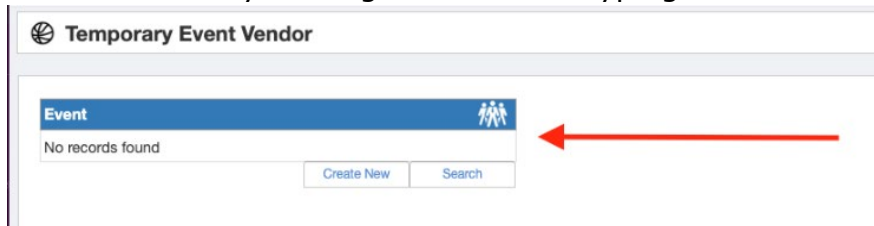


You'll want to populate the owner information in the Contact Manager workflow panel on the right side of the screen, just like we do in the Permit Manager for a routine licensed facility. Click Actions, and either 'Add New Record' if it's a new owner or 'Search to Add' if it's an existing owner.

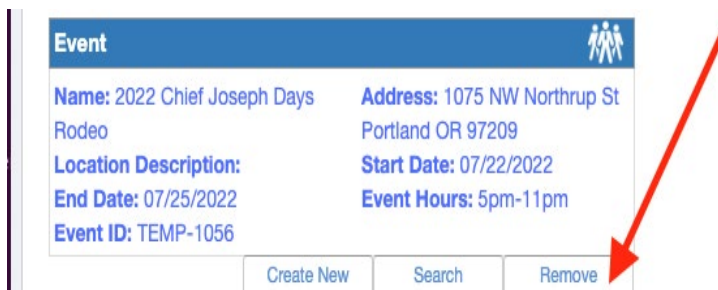


Next, we'll fill out the remaining fields on the left.

The Event field should be kept populated with the event that you need populated on the License. You can do so by clicking "search" and typing in the event name and adding it.



To remove event so that you can add a new event to the license, click "remove" and add the new event.



The Issue and Expiration Date for the facility will also need to be kept current with the event that is attached in the event box so that the license is populated correctly.

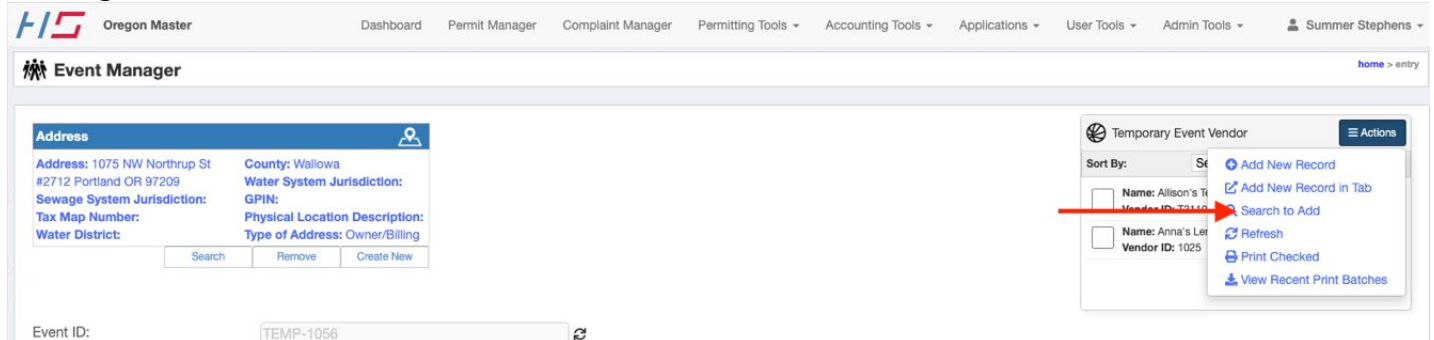
**Operating Information**

* Application Date:	<input type="text" value="05/10/2022"/>
* Issue Date:	<input type="text"/>
* Expiration Date:	<input type="text"/>
Time of Operation:	<input type="text"/>

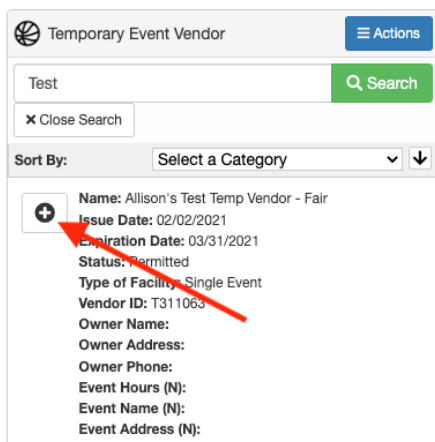
Each time that the Issue and Expiration Dates are changed, a PDF version of the license will save. Since we have restructured the parent relationship, we do have a ticket in to fix the name structure since that is no longer working correctly. The PDF will be saved, the event name will not be correct until that ticket is addressed. You may also download the license and upload it yourself if you wish so that you can name is appropriately.

## Adding a Vendor to the Event

If the vendor already exists and is permitted in your system, you can add them to the event by clicking Actions > Search to Add on the Event record



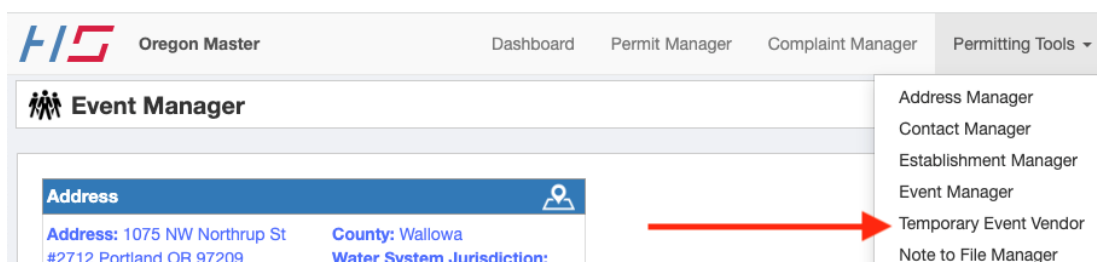
Type in the vendor's name and press the plus sign to add them to the event.



## Adding Events to a Vendor

You can also add an event or multiple events to the vendor through the vendor workflow panel.

First, we'll go to Permitting Tools > Temporary Event Vendor



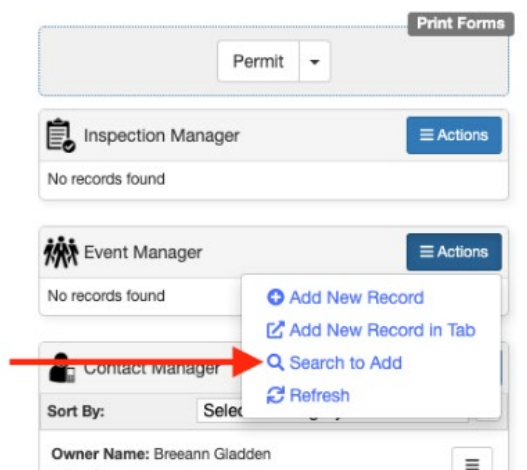
Select the appropriate vendor from the list screen by either searching or filter until you find the needed record:

**Temporary Event Vendor**

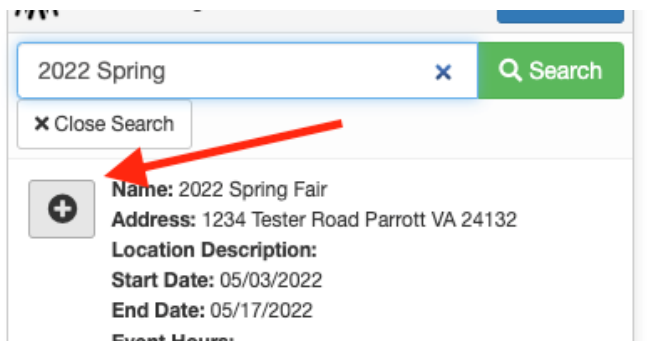
[Add New](#) [Filter Options](#) [Actions](#) You have pending drafts [Show Me](#)

<input type="checkbox"/>	Name	Issue Date	Expiration Date	Status	Type of Facility	Vendor ID	Owner Name
<input type="checkbox"/>	Summer's Corn Dog Stand	06/06/2022	06/20/2022	Permitted	Seasonal	T311081	Tim Smith
<input type="checkbox"/>	Summer's New Test Vendor May 2022	05/26/2022	05/27/2022	Permitted	Seasonal	T311079	Breeann Gladden

On the right side of the screen, find the Event Manager workflow panel and click **Actions > Search to Add**



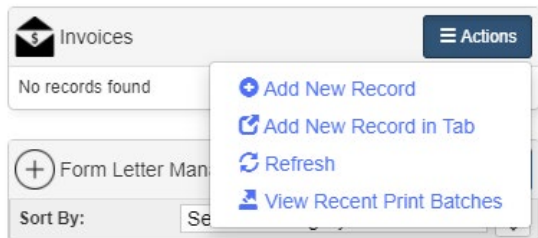
Type in the Event's name and click the plus sign next to it:



## Adding and Paying License Fee

*Note: If you've just added in a new contact/owner, clear your cache when you return to the Permit Manager before entering an invoice so that the system is refreshed with the new owner information included*

Creating an invoice will generate a record of what is owing so you can make the payment. Go to the Invoices box on the right-hand side of the view and select Add New Record:



Enter the Invoice Date (usually today's date) and a due date (today's date if they have already given you their payment), then click the plus sign to add fees:

Invoice Due (New Entry) Cancel

\* Invoice Date: 03/25/2021 Parent Account

\* Due Date: 03/25/2021 Account Owner:  
Erica Owner Van Ess  
Balance:

**Fees** + \$0.00  
Address:

Fee	Quantity	Amount	Reverse Comments	Reverse

120 E Van Owner Way Portland OR 97232  
Account Number:  
1363

Select the applicable fee in the dropdown and then Click Add Fee:

**Fees** +

Fee	Quantity	Amount	Reverse Comments	Reverse
Annual	1.00	45.00		🔒

\* Total: \$ 45.00

Amount Paid: \$ 0.00

Balance: \$ 45.00

Invoice Number:

Note:

Permit

No records found Search

Temporary Event Vendor

Name:  
Erica's Elephant Ears  
Issue Date:  
05/28/2021  
Expiration Date:  
05/30/2021

Then click the Save Invoice button in the upper right-hand corner:

Fee	Quantity	Amount	Reverse Comments	Reverse

\$0.00  
 Address:  
 123 Erica Owner Way Portland OR 97232  
 Account Number:  
 1363

Cancel **Save Invoice**

**Note: If a vendor pays for several events at once, be sure to apply a payment for one event at a time and then print/pdf the permit between each payment. This will ensure each license has the correct payment amount for that event.**

If you are posting a payment immediately, you can click Make a Payment in the upper right hand corner. This will take you directly to the Payment screen:

Balance \$ 45.00

Payment History +

\* Payment Date: 05/28/2021

\* Amount: 45

Payment Method: Check

Fees ☰

Invoice: 05/28/2021 | \$45.00 | 1032

Fee Amount: \$45.00 \$45.00

Description: Annual

Check Number: 1234

Click Save Account in the upper right-hand corner of the screen to save the record and generate the permit.

Use the back arrow on your browser or open the facility from Permitting Tools>Temporary Event Vendor and you can print/email the permit from the Permit Manager screen.



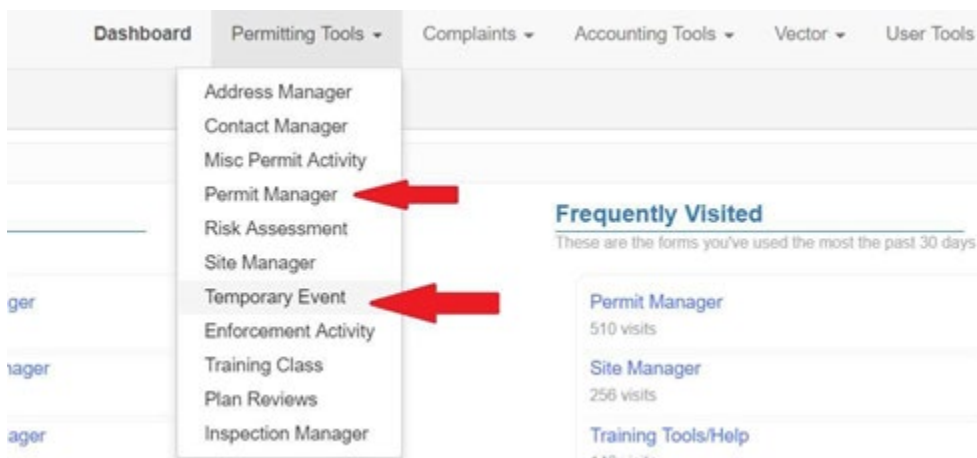
## Temporary Restaurant License Mapping Example

Example of mapping of your temporary restaurant license:



## Viewing Existing Event and Temporary Event Permit Records

Use the top navigation to access existing events and temporary event permits.



Use the keyword search to look up an existing record. Once a record is found, simply click on the record to open and view.

## License Proration/Entering Facilities after Running Renewals

### Step 1: Adding in pro-rated facilities for the current year and creating an Invoice/Renewal for next year for new facilities after October 1.

*Note: You will need to follow these steps **exactly** for the system to process both the pro-rated and following year's invoices/licenses correctly. If your county does not pro-rate licenses, you can skip to Step 2.*

1. Enter the new facility as you normally would and when creating the invoice, select the correct billing type for the facility, type the pro-rated fee amount over the existing annual fee and then add "Pro-rated fee" as the Fee Note:

Invoice Due  
10/31/2023

\* Invoice Date: 10/02/2023

\* Due Date: 10/31/2023

**Fees**

\* Fee:  
Restaurant (0-15 seats), Annual - \$530

Quantity: 1

Amount: 325.00

Fee Note:  
Pro-rated fee

Add Fee Cancel

2. Click the green Save Invoice button and then the blue Make Payment button at the upper right:

Cancel Make Payment Save Invoice

3. Finally go back to the Permit Manager for the facility and print the pro-rated license for this year.
4. Then you can move on to generating the invoice (and apply payment) for next year's license.

### Step 2: Applying Payment to Next Year's License (new or existing):

- 1) Make a small change to the Expiration Date by clicking on the calendar (like changing the date to 12/30/202X and then back to 12/31/202X) so it will allow you to save the record
- 2) Click Save at the bottom of the screen and accept the popup message asking to save a copy of the license

- 3) Clear your cache
- 4) Make sure that you now see a PDF of your pro-rated license in the attachments for the facility (if you don't, try clearing your cache again or changing the date and resaving once more):



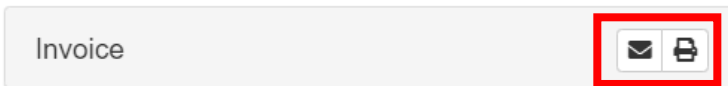
- 5) To pay a newly created invoice, change the License Issue and Expiration dates to 1/1/2023 and 12/31/2023:

Issue Date:  x

Expiration Date:  x

*Note: Skip this step if paying an existing 2024 renewal invoice, since it will update the dates automatically*

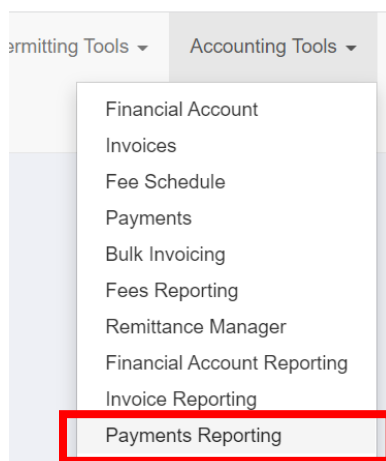
- 6) Add a new invoice for next year's license amount owing. If they have paid already, then you can just apply payment like normal. If they need a renewal mailed to them, click on the printer icon at the very bottom of the invoice screen. **Be sure to click on the form titled "Invoice" for it to work properly:**



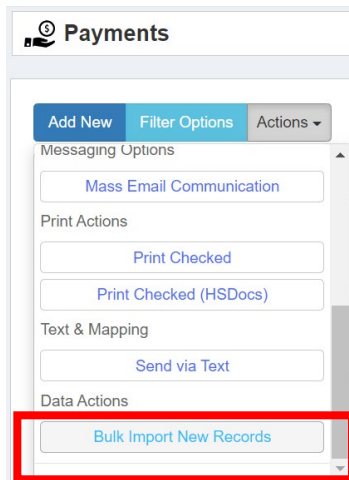
## Applying Payments (3 options)

### 1) Batch Payments: To apply multiple payments at a time by account number OR invoice number

Go to Accounting Tools>Payments Reporting:



Then go to Actions>Bulk Import New Records:



This will open a grid that will allow you enter Payment Date, Amount, etc... where you can enter as many checks as you have in one batch.

**IMPORTANT: You should enter either the Invoice Number or the Account Number, NOT both. It has to be one or the other. You will want to use Account Number if you are applying a big check to many facilities owned by the same person. It will apply the amount entered to each outstanding invoice for that owner.**

	Payment Date	* Amount	* Payment Method	* Check Number	Received	Note	Receipt Number	Invoice Number	Account
1	12/15/2022	100	Check	1234	Mail		IGNORE THIS FIELD	78910	
2			Select a Method						
3			Select a Method						
4			Select a Method						
5			Select a Method						
6			Select a Method						
7			Select a Method						
8			Select a Method						
9			Select a Method						
10			Select a Method						
11			Select a Method						
12			Select a Method						
13			Select a Method						
14			Select a Method						
15			Select a Method						
16			Select a Method						
17			Select a Method						
18			Select a Method						
19			Select a Method						
20			Select a Method						

Clear data

Flatfile Powered. [LEARN MORE](#)

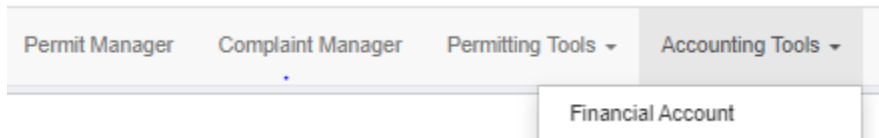
Continue

After you are done entering data, click Continue and it will apply the payments to the invoices (or acct number) that you entered in each row.

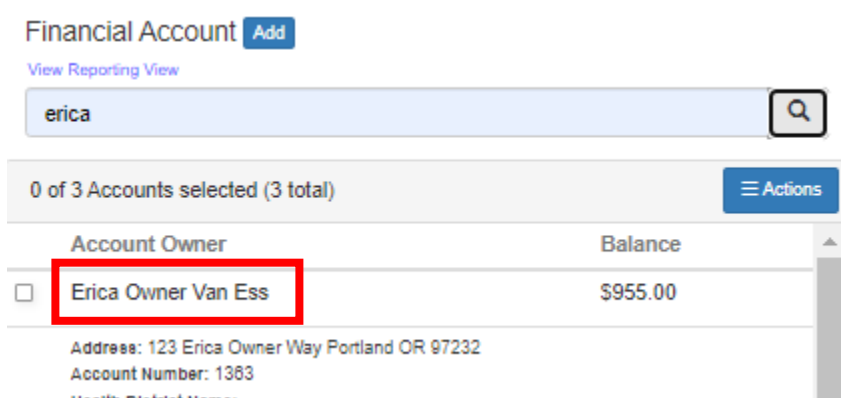
*Note: It is helpful to have this view open on one screen (or split screen) and the Invoice Reporting view open on another for a reference to find either the invoice or the account numbers quickly.*

## 2) Financial Account for the Owner

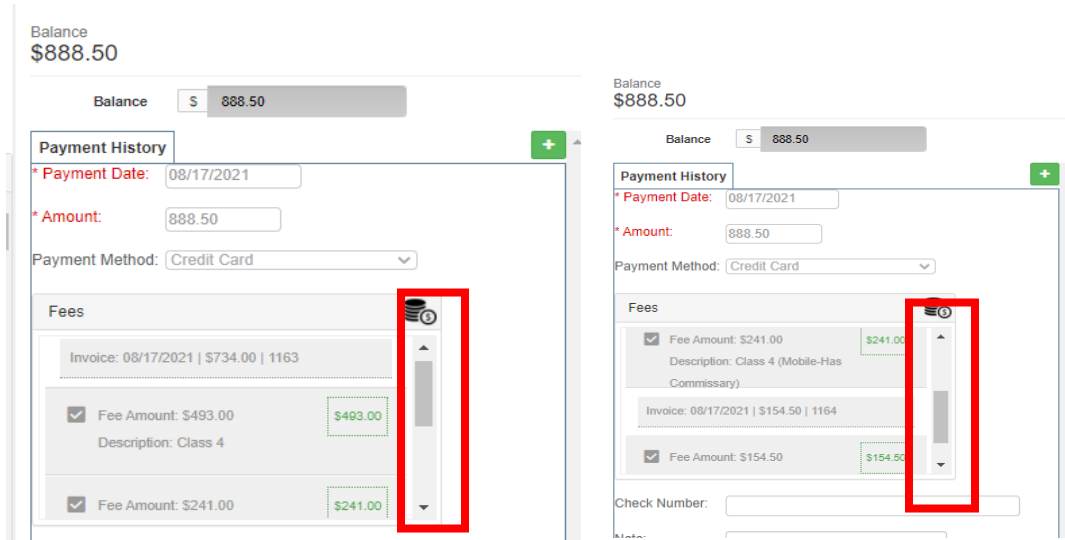
Start in Accounting Tools>Financial Account:



Here you can easily apply payments for all facilities with one owner. Search for the owner's name in the left-hand side of the screen and then click on their name to open their account:



When applying fees for multiple facilities under one owner be sure to click on each one in the gray Fee Selection box. If there are several facilities, you will have to scroll down to see/select them all:



Then search for the next owner and do the same thing until all the payments are entered.

## 3) Invoices List View

This method is easier if you want to be able to see the facility ID and/or invoice number while you are applying payments.

Start in Accounting Tools>Invoice Reporting:

This will take you to a list screen where you can see all the invoices and are able to search on facility name, facility ID, invoice number, etc.

Invoices							
<a href="#">Add New</a> <a href="#">Filter Options</a> <a href="#">Actions</a>							
<input type="checkbox"/>	Due Date	Balance	Account Owner Name	Invoice Date	Invoice Number	Total Due	Facility ID
<input type="checkbox"/>	12/31/2021	\$150.00	Summer Stephens	10/28/2021	1611	\$250.00	1339

Click anywhere in the record and it will open the invoice where you can click the “magic pencil” to take you to the owner account to post the payment like you normally would.

After applying the payment, click the browser back arrow twice to take you back to the invoice list screen to apply the next payment.

## Adding a Credit to a Renewal Invoice for an Overpayment from Previous Year

1. Go to the Financial Account where you can see the payment history
2. Find the receipt for the line item with the overpayment
3. Click on the Payment Allocation funnel icon:

Balance

**\$1,738.00**

Cancel [Save Change](#)

Balance \$ 1738.00

**Payment History**

#	Note	Receipt Number	Reverse	Refund	Refund Amounts	Applied To	Print
		5168			\$		
		5169			\$		
		2261			\$		
		5170			\$		
		6024			\$		

**Parent Contact**

Owner:  
Prime Administration, LLC - Oswego Pointe Apts  
Title:  
Owner  
Primary Contact Name:  
Central Accounts Payable - Oswego Pointe Apts  
Owner Address:  
PO BOX 360859 Los Angeles CA 90036  
Primary Phone:  
(503) 635-9100  
Cell Phone:  
Contact Email Address:  
Related Permit:  
Related Event:  
Account Balance:  
\$1,738.00

4. You will then be able to see that you have more funds to be allocated:

Fees Payment Applied To

Payment of \$505.00 applied to \$280.00 in fees

55% allocated

Invoice	Fee	Quantity	Amount
5355	Seasonal Spa (Additional, Limited Use)	1	280.00 of \$280.00 applied

Apply Payment to Fee(s)

Close

5. Click the "Apply Payment to Fees" button and apply it towards the new invoice
6. Then go to the invoice for the facility and it will now show the true amount owing for next year with the credit added
7. Print the updated invoice

## Applying Credits (not recommended)

HealthSpace recommends only applying credits when absolutely necessary. It is a better practice to refund overage amounts at the time of payment, so you don't have to track these fiscal issues over time. Another options is to add in the full payment submitted (including excess) and leaving the owner showing a negative balance reflecting the overpayment as part of their record.

*Note: When you have an over payment, be sure to only enter the payment amount that is being applied at the time of payment. For example, if the financial account/invoices have a balance of \$100, but you have a check for \$150, you should only post the \$100 payment.*

### Logging a Credit:

1. Go to the Billing/Owner contact on the Permit Manager screen.
2. Scroll down to see the Credits Available/Credit History reload box. Use this to log the credit to this financial account (due to overpayment, etc.):

The screenshot shows the 'Oregon Master' software interface. At the top, there are navigation tabs: Dashboard, Permit Manager, Complaint Manager, Permitting Tools, Accounting Tools, Applications, User Tools, and Admin. Below the navigation, it indicates '0 of 15 Accounts selected (441 total)'. The main content area is divided into several sections:

- Account Summary:** Shows account owner details (Guadalupe Suarez), address (123 Guadalupe Way Salem OR 97305), and account number (1415).
- Payment History:** A table with columns: Payment Date, Amount, Payment Method, Reversal Reason, Check Number, Received, and Note. It lists several payments, including one for \$100.00 on 01/13/2023.
- Credits Available/Credit History:** A section with a table for credit history and a 'Total Credit Available for Use' field. A red box highlights this section in the original image.
- Owner Information:** Details for Erica Owner Van Ess, including title, address, and contact information.
- Attachments:** A section indicating 'No records found'.
- Record History:** A list of recent system events, such as 'Balance Automatically Recalculated'.

3. Enter the payment amount (\$100 in this example) as normal.
4. Then click the green plus to add the credit amount below (\$50 in this example):

This screenshot provides a closer look at the 'Credits Available/Credit History' form. The form is titled 'Credits Available/Credit History' and includes the following fields:

- Date:** 01/13/2023
- Credit Added or Used:** A dropdown menu set to 'Added'.
- Amount:** A numeric input field set to 50.00.
- Reason for Credit:** A dropdown menu set to 'Over Payment'.
- Credit Source:** A dropdown menu set to 'Check'.
- Credit Reason and Source Notes:** An empty text input field.
- Buttons:** 'Add' (highlighted with a red arrow) and 'Cancel'.
- Total Credit Available for Use:** A numeric input field set to 0.00.
- Assigned To:** A search field with the placeholder text 'Search to assign user...'.

When complete it will show the account paid in full (balance of \$0) and that there is a credit for this owner/financial account that is now available for use:



Balance  
\$0.00

Balance \$ 0.00

**Payment History**

Payment Date	Amount	Payment Method	Reversal Reason	Check Number	Received	Note	Receipt Number	Re
01/13/2023	100.00	Check		3424	In Office		1537	

Account Number 1604

**Credits Available/Credit History**

Date	Credit Added or Used	Amount	Reason for Credit	Credit Source	Credit Reason and Source Notes	Edit	Delete
01/13/2023	Added	50.00	Over Payment	Check			

Total Credit Available for Use 50.00

Assigned To Search to assign user...

## Applying Credit Balance to an Invoice

- When it's time to apply a credit balance to another invoice and fee, you will use the Payment History entry, but you will select Credit Balance as the payment method:

Balance \$ 0.00

**Payment History**

\* Payment Date: 01/13/2023

\* Amount:

\* Payment Method: **Credit Balance**

Fees: No records ma

Check Number:

Received: In Office

Note:

Receipt Number:

Add Payment Cancel

- Save payment.
- Then, you will use the "Credit Available/Credit History" reload to log that you used some or all of the credit available. Enter the date, that credit was Used, and the amount used. You may also enter Credit Reason/Notes.

You must enter a NEGATIVE number in the amount:

**Credits Available/Credit History** ⚡ ⚙

Date:  x

Credit Added or Used:

Amount:

Reason for Credit:

Credit Source:

Credit Reason and Source Notes:

**Credits Available/Credit History** ⚡ ⚙

Date	Credit Added or Used	Amount	Reason for Credit	Credit Source	Credit Reason and Source Notes	Edit	Delete
01/13/2023	Added	50.00	Over Payment	Check		✎	✕
02/01/2023	Used	-50.00				✎	✕

Total Credit Available for Use:

*Note: The "Total Credit Available for Use" always updates automatically based on proper entry into the "Credit Available/Credit History" reload. Be sure to enter a negative number when noting credit was used.*

## Batch Printing Licenses

When you enter many payments with bulk payments or use online payment methods through HealthSpace, you will want to batch print licenses so that you don't need to open each facility.

### After Bulk Payments

*Note: LPHAs using online payments should generate their batches of licenses each morning for the previous day (instead of doing this at the end of the day) to catch any licenses paid during hours the office wasn't open.*

1. Go to the Permit Manager and click the Filter By button
2. Choose Permitted and Date Payment Posted = yesterday's date (if you do online payments) or today's date (if you are entering all your payments manually and want to print the batch at the end of the workday).
3. You can also do a date range to include the weekend or if you haven't printed in a couple days.
4. Then select all the facilities showing from the filter and go to Actions>Print Checked>Print Together and it will generate all of them in one PDF that you can send to the printer.

## Fee Exempt Licenses

Filter for these using Fee Exempt in the Permit Manager, select them all and go to Actions>Print Checked>Print Together and it will generate all of them in one PDF that you can send to the printer:

Permit Manager										
Filter Options Actions										
Status EQUAL Permitted Billing Type EQUAL Restaurant (Fee Exempt Food Service)										
<input checked="" type="checkbox"/>	Facility Name	Owner	Facility Address	City	Status	Program	Owner Address	Facility ID	Billing Type	Assigned To
<input checked="" type="checkbox"/>	Christ's Center	Christ's Center	530 W 7th Junction City, OR 97448	Junction City	Permitted	Food	530 W 7th Junction City OR 97448	NFRY-ACC23E	Restaurant (Fee Exempt Food Service)	Lenore Smith
<input checked="" type="checkbox"/>	Community Food for Creswell	Susan Blachnik	364 Cobalt Ln Creswell, OR 97426	Creswell	Permitted	Food	PO BOX 351 Creswell OR 97426	ABKW-BRASH6	Restaurant (Fee Exempt Food Service)	Zach Roberts
<input checked="" type="checkbox"/>	Cottage Grove Masonic Lodge	Cottage Grove Masonic Lodge	33322 Row River Rd Cottage Grove, OR 97424	Cottage Grove	Permitted	Food	33322 Row River Rd Cottage Grove OR 97424	NFRY-ACBU4S	Restaurant (Fee Exempt Food Service)	Zach Roberts
<input checked="" type="checkbox"/>	Cottage Grove United Methodist Church	Pastor Craig Pesti-Strobel	334 Washington Ave Cottage Grove, OR 97424	Cottage Grove	Permitted	Food	334 Washington Ave Cottage Grove OR 97424	NFRY-ACBVTF	Restaurant (Fee Exempt Food Service)	Zach Roberts
<input checked="" type="checkbox"/>	Dorena Grange	Dorena Grange #835	34360 Row River Rd Cottage Grove, OR 97424	Cottage Grove	Permitted	Food	PO BOX 1324 Cottage Grove OR 97424	NFRY-ACBUFU	Restaurant (Fee Exempt Food Service)	Zach Roberts

Showing 1 to 30 of 30 rows

## Generating Second/Third/Final Renewals

- 1) Go to Accounting Tools>Invoices
- 2) Click View Reporting View:

The screenshot shows the 'Invoices' section of the H/S Oregon Master software. The 'View Reporting View' link is highlighted with a red box. Below it, there is a search bar and a table of invoices. The table has columns for 'Due Date' and 'Total Due'. One invoice is listed with a due date of 12/09/2020 and a total due of \$1,275.00.

- 3) This will show you a list of all the invoices in the system
- 4) Click the Filter By button and filter on 12/31/20XX (current year) due date and Balance>0 to show all outstanding renewals. This example is for the 2023 renewals:

You may want to filter to exclude General and School here if you have any invoices in place for those programs.

- 5) Make sure you have included all records by increase the number of records at the bottom. In this example, you would increase it from 50 records per page to 500:

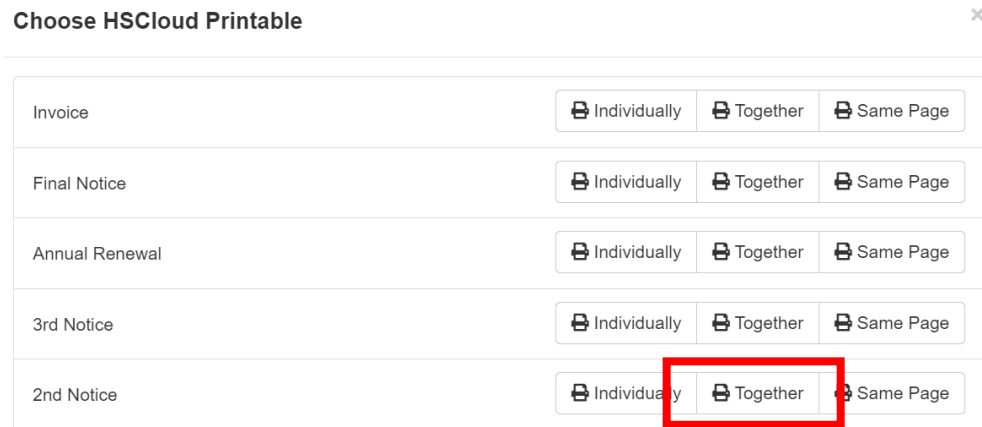
Showing 1 to 50 of 439 rows  records per page

- 6) Sort on the Owner name by clicking Account Owner Name until you get the blue triangle pointing up to sort in Ascending order:

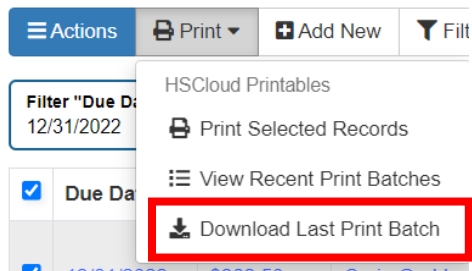
- 7) Click the check box at the upper left of the list to select all:

<input checked="" type="checkbox"/>	Due Date	Balance	Account Owner Name	Invoice
<input checked="" type="checkbox"/>	12/31/2021	\$530.00	Berenice Garcia	10/28/21
<input checked="" type="checkbox"/>	12/31/2021	\$250.00	Summer Stephens	10/28/21
<input checked="" type="checkbox"/>	12/31/2021	\$600.00	Douglas P Withenille	10/28/21
<input checked="" type="checkbox"/>	12/31/2021	\$600.00	The Blythe Cricket, LLC	10/28/21

- 8) Go to Print>Print Selected Records and select Print Together for the row with the form you want to use (Second Notices in this example):



9) Then go to Print>Download Last Print Batch to download the batch:

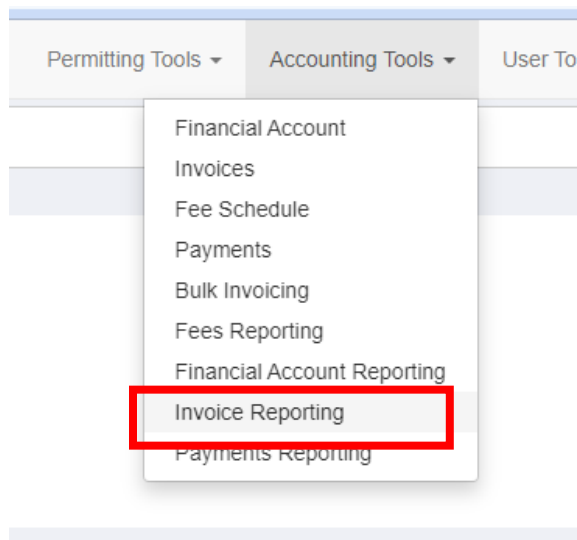


10) Click on the file, and it will open the PDF of the printables to print and mail.

## Assessing Late Fees

For those of you new to Environmental Health, the Food Program late fees can be assessed after January 1 and for each month after. The Tourist Program late fees are assessed on January 15<sup>th</sup> and then for each 30 days after. Be sure to talk to the EH Manager to see what has been done historically as far as a grace period before assessing fees, etc. because that can vary from county to county.

1. Start in Accounting Tools>Invoice Reporting



- Click on Filter By button and use on Due Date=12/31/XX, Balance>0, Permit Status=Permitted:

The screenshot shows the top navigation bar with buttons for 'Actions', 'Add New', 'Filter By', 'Reporting Fields', and 'Columns & Sort'. Below this, three filter boxes are visible, each with a close button (X). The first filter is 'Filter "Due Date" Equal: 12/31/2023', the second is 'Filter "Balance" Greater Than: 0', and the third is 'Filter "Permit Status" Equal: Permitted'.

(NOTE: You ***no longer*** need to select Food and Tourist Facilities separately)

Make sure all records are showing on the screen by adjusting the dropdown at the bottom left of the screen:

The screenshot shows a dropdown menu for 'Showing 1 to 102 of 102 rows' and '150 rows per page'. The dropdown is highlighted with a red box.

- Click the checkbox at the upper left of the list to select all:

The screenshot shows the 'Owing Facilities' view. The top navigation bar includes 'Default View' and 'Owing Facilities'. Below this, the same filter bar is visible. A red arrow points to the checkbox at the upper left of the list, which is checked. The list columns are 'Due Date', 'Balance', 'Account Owner Name', 'Invoice Date', 'Invoice Number', and 'To'.

- Go to Actions>Mass Update Selected Records:

The screenshot shows the 'Actions' dropdown menu. The options are: 'Export Functions' (Export Checked To CSV, Export Checked To Excel, Export All Records To Excel), 'Messaging' (Send Mass Email, Send via Text), and 'Data Actions' (Mass Update Selected Records, Quick Edit Selected Records). The 'Mass Update Selected Records' option is highlighted with a red box.

- Click the Green Plus

## b. Select Late Fees:

*NOTE: If you are adding late fees to **all** facility types continue with Steps i and ii below. If you are adding late fees to **food only**, complete Step i and then continue to Step 5. If you are adding late fees to **tourist only**, complete Step ii and then continue to Step 5. If you are adding any other late fees (i.e. pools/spas), complete Step iii before continuing to Step 5.*

- i. Food: Select "Late Fee, Food Program" from the list, add Fee Notes (optional), and press the green Add Fee button.

The screenshot shows a 'Fees' form with the following fields and values:

- \* Fee:** Late Fee, Food Program - \$100
- Quantity:** 1
- Amount:** 100.00
- Fee Note:** January (Keep to 40 Characters or Less)

At the bottom of the form, there are two buttons: 'Add Fee' (highlighted with a red box) and 'Cancel'. Below the form is an 'Assigned To:' field with a search prompt 'Search to assign user...'.

*NOTE: If you are adding late fees to all facility types **DO NOT** select Continue. If you are adding late fees to **ONLY** Food facilities continue to Step 5.*

- ii. Rec Park, Traveler's Accommodations and Org Camp:
  1. Click the Green Plus button.
  2. Select "Late Fee, Tourist Program" from the list, Type in 50 in the % Amount field, add Fee Notes (optional).

The screenshot shows a 'Mass Update (16 records)' dialog box with a 'Fees' form. The form contains the following fields and values:

- \* Fee:** Late Fee, Tourist Program - \$
- Quantity:** 1
- Amount:** 0.00
- % Amount:** 50 (highlighted with a red box)
- Fee Note:** January (Keep to 40 Characters or Less)

At the bottom of the form, there are two buttons: 'Add Fee' and 'Cancel'. Below the form is an 'Assigned To:' field with a search prompt 'Search to assign user...'. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Continue'.

*NOTE: If you are adding late fees to additional facility types **DO NOT** select Continue. If you are adding late fees to Food and Tourist facilities **ONLY** continue to Step 5.*

## iii. Additional Late Fees:

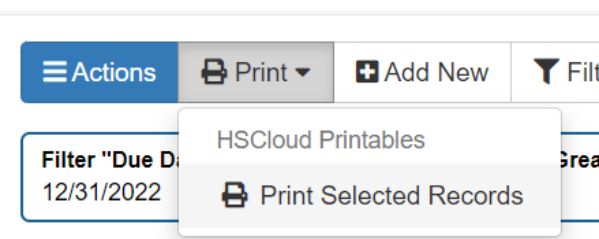
1. Click the Green Plus Button.
2. Select "Late Fee, XXXX" (whichever late fee type you are adding, i.e. "Pool/Spa" from the list, Do nothing if it's a flat fee, if it's a percentage add the percentage, add Fee Notes (optional).

## c. Select Add Fee

5. Select Continue and the system will run through each record adding the correct fees
6. To Print, filter on same items as above
7. Sort by Owner Name so the renewals will print out grouped by Owner:

<input type="checkbox"/>	Due Date	Balance	Account Owner Name
<input type="checkbox"/>	12/31/2022	\$530.00	Adam Roseberry & Leita Barlow
<input type="checkbox"/>	12/31/2022	\$600.00	Christina & Jeremiah Moffit

8. Click the box in the upper left of the screen to select all (double check at the bottom to make sure all records are showing and not just 50)
9. Go to Print>Print Selected Records:



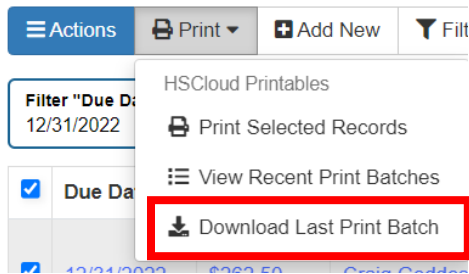
10. Choose Final Notice and select Print Together to group all the renewals by owner.

Choose HSCloud Printable

1 Renewal	<input type="radio"/> Individually	<input type="radio"/> Together	<input type="radio"/> Same Page
2 Second Notice	<input type="radio"/> Individually	<input type="radio"/> Together	<input type="radio"/> Same Page
4 Final Notice	<input type="radio"/> Individually	<input checked="" type="radio"/> Together	<input type="radio"/> Same Page
Invoice	<input type="radio"/> Individually	<input type="radio"/> Together	<input type="radio"/> Same Page
3 Third Notice	<input type="radio"/> Individually	<input type="radio"/> Together	<input type="radio"/> Same Page



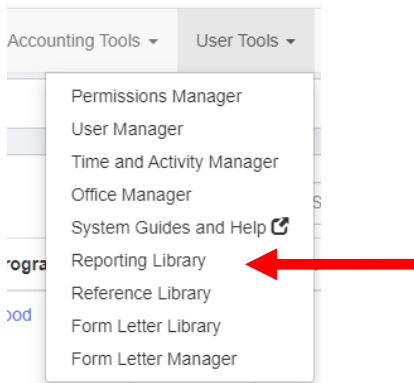
11. Then go to Print>Download Last Print Batch to download the batch:



12. Click on the file, and it will open the PDF of the printables.

## Canned Reports – These are still in progress

The pre-built reports we have run routinely over the years are found in User Tools>Reporting Library:



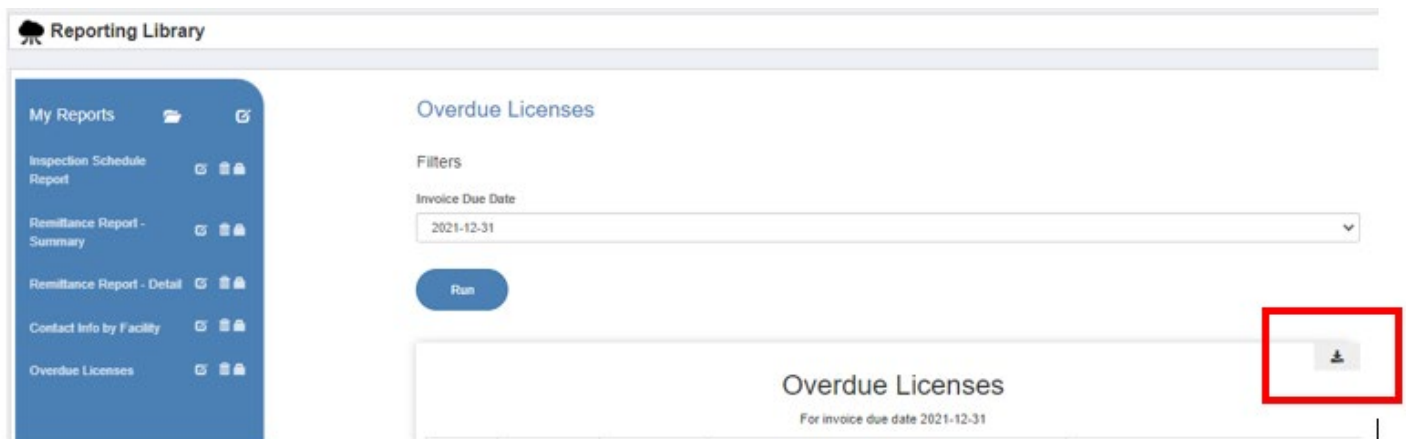
Then you will see all the reports listed in the left-hand menu and you can enter the parameters for each and run them as needed:



HealthSpace is still building out a subscriptions feature that will allow us to request them to be delivered automatically via email, so that is coming soon.

## Overdue Licenses - Canned Report

Got to User Tools>Reporting Library>Overdue Licenses. Use the Invoice Due Date of the current licensing year (2021 in this example) and click the Export down arrow in the right-hand corner to push it to Excel where you will be able to see all the columns properly:



## Overdue Licenses – Manual Pull

To pull this data manually, go to Accounting Tools>Invoice Reporting and Filter on Due Date=12/31/22, Balance owing >0 and Permit Status=Permitted and select Apply Filter:

Filter By ×

---

**Due Date**

Date Equal to (Default) ▼

12/31/2021 📅

**Balance**

Number Greater Than One Value ▼

0 ⬆️⬆️

**Invoice Date**

Date Equal to (Default) ▼

Start Date 📅

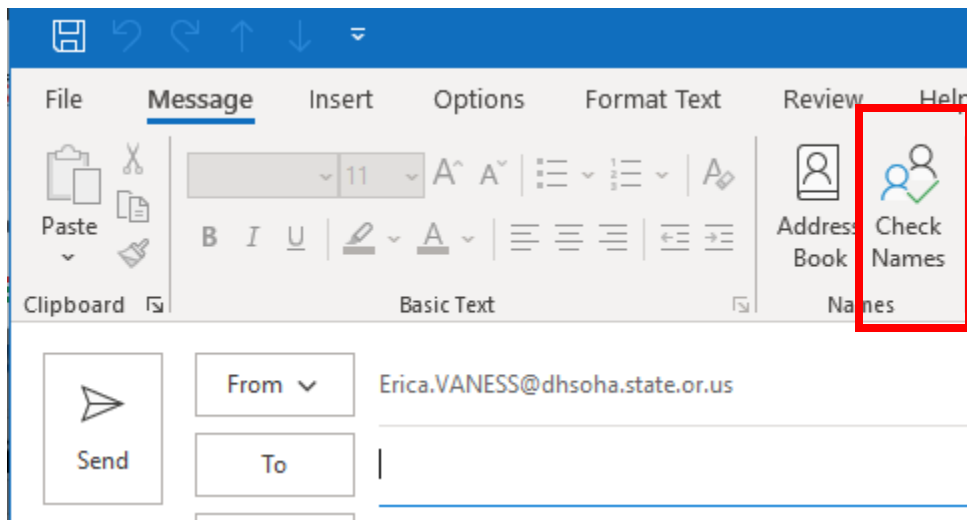
**Permit Status**

Record Equal to One or More Values (Default) ▼

Permitted ✕

This will show all the renewals invoices that have an outstanding balance in the system. Make sure all records are showing on the screen (not just the first 50), then click the blue box in the upper left-hand corner to select all records.

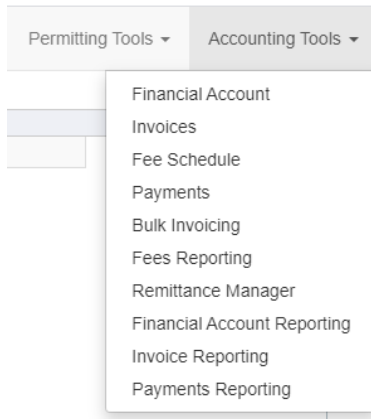
Go to Actions>Export entire record set to Excel. This will generate a spreadsheet of all the owing facilities along with the owner phone numbers and email addresses. In Outlook, you can simply highlight all the email addresses in the column and then copy and paste them into the To: box of a new email, then click the Check Names icon and it will “clean” them all up:



*Note: This can be used for sending out a blast email reminder but will not send each owner their actual renewal invoice. This functionality will be added but is not in place at this time.*

## Fiscal Reporting

For fiscal reporting, you will want to start in Accounting Tools and look at the views ending in “Reporting”:



When looking for payment details, you will want to look at Payments Reporting or Payments to see a list of all payments applied to an owner record/account. This is especially helpful when owners have made partial payments.

## Plan Reviews

The plan review section is intended to automatically pull in plan review application information from the web portal. When operators enter this information online, it will come in directly to your system for you to review and edit.

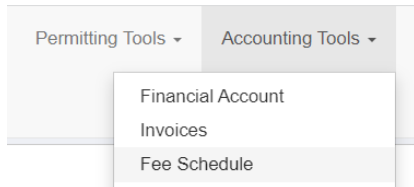
If you are manually adding in plan reviews from paper files, you can just enter the Owner and Establishment info and then skip all the fillable fields through the rest of the page and just save the scanned plan review form as an attachment at the bottom.

**\*\*It is important to save your plan review documentation under the Plan Review box in the workflow panel so that it will store them correctly for records retention purposes moving forward.\*\***

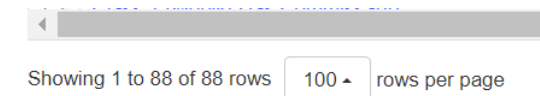
## Updating Fees

**IMPORTANT: Do not change the names of any of the license fee types, as this will break other parts of the system. Update the monetary fee amounts only.**

1. Go to the Accounting Tools>Fee Schedule:



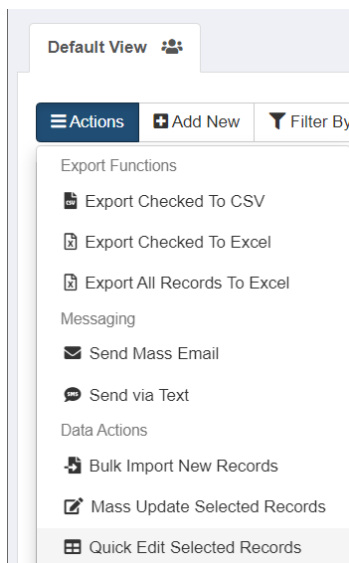
2. This will pull up a list of all your fees. Make sure the view is showing all your fees by looking at the bottom left and adjusting how many are showing on the page if necessary:



3. Click the blue checkbox in the upper left of Description to select all:

<input checked="" type="checkbox"/>	Description
<input checked="" type="checkbox"/>	Benevolent Temporary (Intermittent)
<input checked="" type="checkbox"/>	Benevolent Temporary (Intermittent)
<input checked="" type="checkbox"/>	Benevolent Temporary (Seasonal)
<input checked="" type="checkbox"/>	Benevolent Temporary (Seasonal)
<input checked="" type="checkbox"/>	Benevolent Temporary (Single Event)
<input checked="" type="checkbox"/>	Benevolent Temporary (Two Day Eve
<input checked="" type="checkbox"/>	Class 1

4. Go to Actions>Quick Update Selected Records:




- 5. This will pull up a view similar to an Excel spreadsheet. Click on each Fee Amount cell and update the dollar amount (ignore the extra zeroes). **Only change data in the Fee Amount and Fee Code columns, do not make changes to any other data here.**

Update 88 Fee Schedule records ✔ Upload > ✔ Match > Review

Only show rows with problems  Show modifications

Fee Category	Fee Description	Fee Amount	Fee Code	Status
1 Annual	Benevolent Temporary (Intermittent)	0.000000		Active
2 Plan Review New Construction	Benevolent Temporary (Intermittent)	75.000000		Active
3 Annual	Benevolent Temporary (Seasonal)	0.000000		Active
4 Plan Review New Construction	Benevolent Temporary (Seasonal)	75.000000		Active
5 Annual	Benevolent Temporary (Single Event)	0.000000		Active
6 Annual	Benevolent Temporary (Two Day Event)	0.000000		Active
7 Plan Review New Construction	Class 1	400.000000	FMPR	Active
8 Annual	Class 1 (Fee Exempt Food Service)	0.000000	FEF	Active
9 Annual	Class 1 (Mobile-Has Commissary)	255.000000	FM1C	Active
10 Annual	Class 1 (Mobile-Has Warehouse)	255.000000	FM1W	Active
11 Annual	Class 1 (Mobile-Self-Contained)	255.000000	FM1E	Active
12 Plan Review New Construction	Class 2	400.000000	FMPR	Active
13 Annual	Class 2 (Fee Exempt Food Service)	0.000000	FEF	Active
14 Annual	Class 2 (Mobile-Has Commissary)	255.000000	FM1C	Active
15 Annual	Class 2 (Mobile-Has Warehouse)	255.000000	FM1W	Active
16 Annual	Class 2 (Mobile-Self-Contained)	255.000000	FM1E	Active
17 Plan Review New Construction	Class 3	400.000000	FMPR	Active
18 Annual	Class 3 (Fee Exempt Food Service)	0.000000	FEF	Active

- 6. After making all the updates, scroll to the bottom right of the screen and click Continue.
- 7. Say Yes to the pop-up message:

 Are you finished editing and ready to confirm changes?

- 8. It will then generate a screen for you to review the changes made
- 9. If it all looks good, click Continue. This will generate a screen asking for comments where you can add information:

### Review Changes

Please enter a comment regarding these change(s)

2023 License Fee Increase, Approved by Commissioners 6/20/23

- 10. Click Continue one last time and you are done! The new fee will now be tied to your license categories and will be assessed for all new invoices issued moving forward.

## Misc.

### Changing Inspector Districts

To bulk change the inspector districts:

Permit Manager>Filter for the inspector to who will be changing districts>Add a checkmark for all facilities in list

Select Actions>Quick Update Checked>Assigned To:>type in new inspector's name and click Continue:

---

Quick Update (1 records)

Assigned To:

### Moving an Inspection to a New Facility

If an inspection is accidentally created with the wrong facility, it can easily be moved to a different facility.

Go to Permitting Tools>Inspection Manager and find the inspection you would like to move and click Remove in the Permit Manager in the upper left-hand corner:

**Inspection Manager**

Program: Food	Owner: Erica Owner Van Ess
Owner Address: 123 Erica	Facility ID: 1334
Owner Way Portland OR 97232	Billing Type: Restaurant (16-50 seats)
Assigned To: Erica Van Ess	Next Routine Inspection Due: 04/11/2022
County: Multnomah	Facility Phone: (111) 222-3333
Owner Phone: (111) 222-3333	Balance: \$95,000

Then Search to find the facility you would like to move the inspection under:

**Permit Manager**

No records found

Then move to the bottom on the inspection and hit Save.

*Note: If the wrong inspection violation type was selected, then it can't be moved or changed and will need to be re-entered with the correct violation type.*

## Adding a Created Inspection for an Unlicensed Facility

Inspectors will create an inspection in the field and then you will see it populate in CloudSuite. They will complete the inspection in the field and then upload the inspection to the cloud once they are back in the office. To attach it to a facility, you will:

1. Add in the new facility information once you have their paperwork.
2. Find the completed inspection in the Inspection Manager list screen and click to open the record:

Completed Inspection Date	Inspector	Facility Name	Purpose	Outcome	Follow-up	Follow-up Date	Next Routine	Score	Program	Billing Type	Street Address	City
07/02/2021	Ross Coburn	Albany's Test Home (Food)	Inspection	Completed	NO	07/16/2021	07/16/2021		Food/Spa	Newfound Food (Fnc, Limited Use)	1816 Albany Highway	Tillamook
07/01/2021	Larisa Lynch	Albany's Test B&B	Inspection	Completed	NO		12/30/2021		Food	Food-988 (Food-988)	1817 Albany Court	Tillamook
06/30/2021	Ross Coburn	Albany's Test B&B	Semi-Annual	Completed	NO		12/30/2021	0	Food	Food-988 (Food-988)	1817 Albany Court	Tillamook
06/30/2021	Summer Stephens	Summer Stephens	Complaint	Completed	None							
06/30/2021	Summer Stephens	Summer's Wellness Training Cafe	Semi-Annual	Completed	None		12/30/2021		Food	Restaurant (19-20 seats)	111 West Street	Jones

3. Next, we need to attach the newly added Facility/Permit to the inspection by using the search button on the Permit Manager parent record at the top of the Inspection screen.

Inspection Manager Saved as d

Permit Manager x

No records found Search

\* Inspection Date:

\* Inspector:

Accompanied By:

\* Purpose:

4. Search for the facility name and click the + sign next to the correct record to add it to the inspection.

Inspection Manager

Permit Manager x

BBQ Search

+ Facility Name: Sammy's Bbq & Catering  
 Facility Address: 401 N Main St Joseph, OR 97846  
 Status: Out of Business  
 Program: Food  
 Owner: Raindy Garnett  
 Owner Address: 803 Mullen Ln Joseph OR 97846  
 Facility ID: NFRY-AJVTY3  
 Billing Type: Class 4 (Mobile-Self-Contained)  
 Assigned To: John Combs  
 Show Public Inspection Price

Cancel

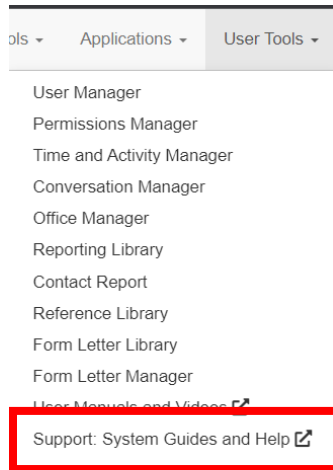
5. The final step is to re-save the inspection at the bottom of the page by clicking Save Changes.

## Contacting Support

If you have questions about CloudSuite or the HSTouch app:



Go to User Tools>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.