

HealthSpace Office User's Manual

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Introduction

In this manual you will find information that will help you navigate through Notes and EnviroIntel; first looking over the application to understand the look and feel, and then more specifically looking at the forms and processes you will use throughout the system.

Use the Oregon EHS Testing Database to practice anything you want to try in HealthSpace—you can't break it! There is a lot of unusual/incorrect data in there from everyone practicing, so disregard any oddities you see.

The EnviroIntel databases and user interfaces are built in the IBM Notes Environment, allowing for the use of the database from remote locations whether connected to the internet or without that connection. The Notes platform also allows HealthSpace developers to make changes to the system in a way that will not overtax IT departments or cause interruption to the end users daily experience. The program can also be used seamlessly in any Windows environment and on any PC, whether desk-top, lap-top or tablet.

Finding Help

For assistance with the HealthSpace software, please call 866-860-4224 for customer support or Erica Van Ess with the Oregon Health Authority (Oregon's Primary Administrative Contact - PAC) at erica.vaness@state.or.us or 971-673-0446.

Local Help

Website:

Additional documents and videos for new users are available on the FPLHS Regulator's Page at www.healthoregon.org/regulators on the HealthSpace Software page.

Co-workers:

Many of your co-workers will have achieved a degree of efficiency in various portions of the program and may be able to assist you.

Primary Administrative Contact (Erica at OHA):

The PAC provides primary, database or district help by answering questions, supplying support and doing basic troubleshooting. Erica will also put in the requests for a userid and password for any new staff in your jurisdiction.

Support Forum

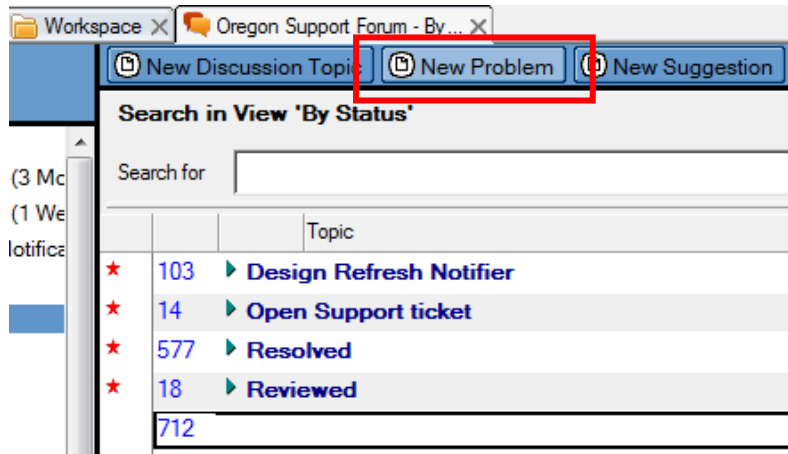
The Support Forum database contains a history of all the approved changes requested by your PAC and the responses by both department staff and HealthSpace staff, so reviewing Forum items may answer your questions. This is also the area in which will make suggestions for changes, report bugs, and suggest new tools to improve or ease the way you work. Feel free to comment or add responses to suggestions made by others in the Design Forum.

Posting in the Forum:

Double click on the icon from your Replication and Sync screen:



Click on New Problem:



Type out a description in the Subject, Select a Posting Type=Problem or Bug Report, and Category=Core-Administration (the general catch all):

Support Forum
Main Topic
Erica Van
Ess/State/Oregon/Health
Space
Today 02:42 PM

Subject:
Post ID: EVES-ATSUMB
Thread ID: EVES-ATSUMA
Posting Type: Problem or Bug Report
Category: Core - Administration
Status: Unprocessed

Where did the problem occur?

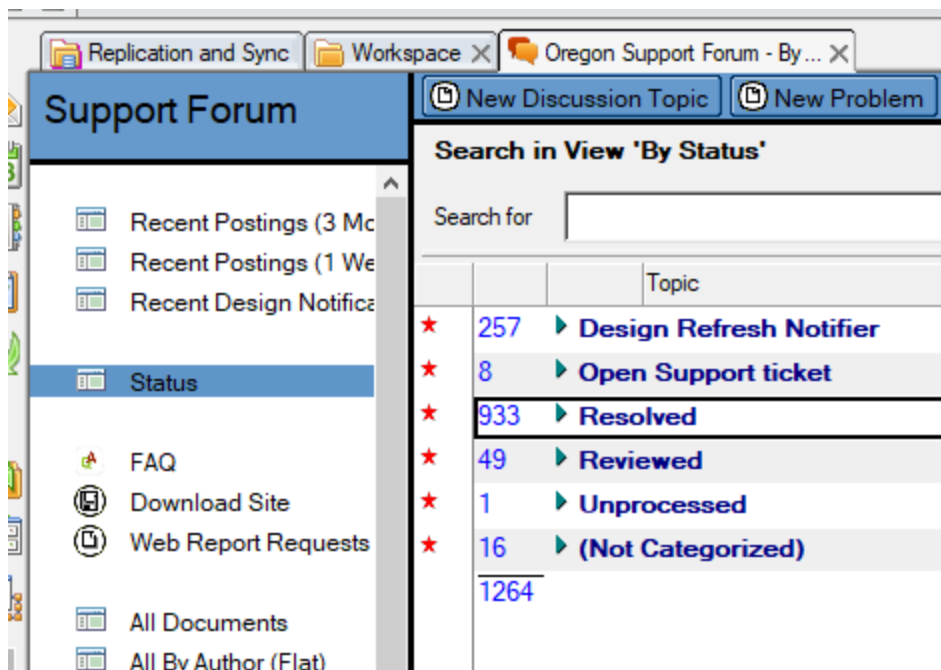
(Please provide detailed information about the form, view, or database)

☐ Form ☐ View ☐ Menu ☐ Database ☐ Web Report ☐ Other

Description of the problem (Main Content)

Add a screen shot and more details in the description of the problem (exactly what did you click on to product the error, etc.). You can drag and drop either a pdf or jpeg file into the white space, attach them using File>Attach from the top menu, or use the paperclip icon in the top tool bar.

The answer to your question will also be shown in the forum, so you will need to check back and look for your question under the Reviewed or Resolved twisties:



Following a Discussion

Select the All Documents view to see a chronological listing of main topics for discussion and their responses.

Select the By Author view to see what individual members of the discussion group have said.

Select the By Category view to browse the group's discussions categorized by main topics.



To Respond to a Discussion:

1. If you want to respond to a main topic, first highlight the main topic document and then select Create/Response. If you want to respond to the message in a response document, highlight the appropriate response document and then select Create/Response to Response.
2. Complete the response form.
3. When you are done, press ESC and answer "Yes" to save your new document.

Help Desk

Help Desk Support (Available Monday through Friday from 7am through 6pm)

We try to respond to all help requests within 4 hours of receipt during work hours.

E-mail:

If you are having difficulties that cannot be resolved by any of the above methods, please e-mail a detailed description of the problem to: support@healthspace.ca

Telephone: Should you not be able to contact us through e-mail, make a detailed description of your problem and call this toll free number: **(866) 860-4224**

When placing a call to the HealthSpace Help Desk, it is important that you have access to the computer and portion of the program you are having difficulty with, so that support personnel can help directly.

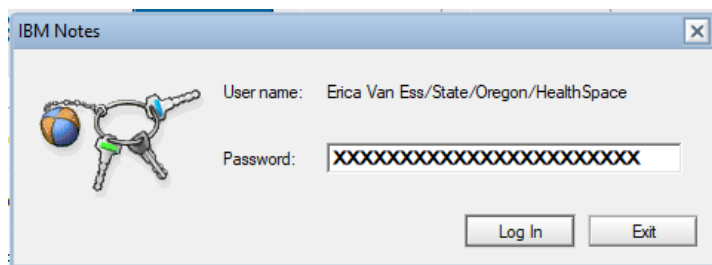
Installing Software

Go to the FPLHS Regulator's Page: www.healthoregon.org/regulators to download the install instructions.

Passwords

Passwords prevent others from using your ID file to access the databases. After a password is set, Notes prompts you to enter it each time you open the program. For security reasons, when you enter your password in the text box, it appears as a series of "X"s.

Note: You will always see the same keychain on the login screen when your password is entered correctly. For example, I will always see the same orange and blue ball after I finish typing in my password if I got it right:



For security reasons, you should change your password from the one initially assigned to you.

- It should contain at least eight characters.
- At least 1 of these should be a non-alphabetic character.
- Your password should not be a single English word or common combination of them.

Notes may not accept your first password. When this happens, type a new password that is either longer, contains more varied kinds of characters, or contains fewer words and names.



Notice:

*Passwords are case-sensitive.
For example, Notes interprets "MickeyMouse" and "mickeymouse" as different passwords.*

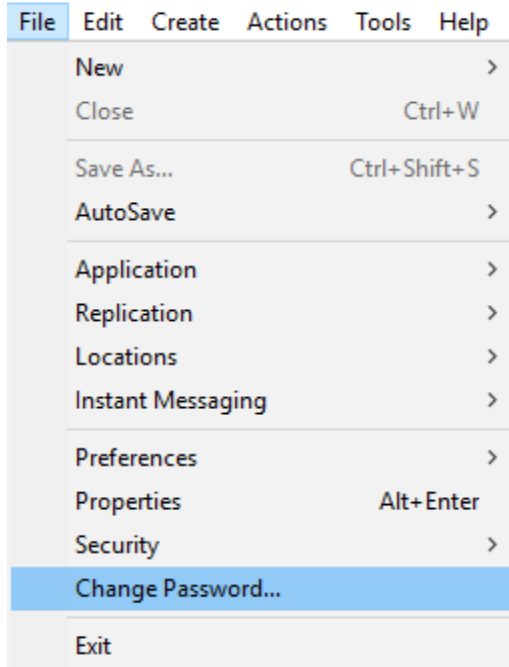
When you have changed your password, memorize it as there is no record of what the new password is. If you forget your password, talk to your PAC who will request a new password for you.



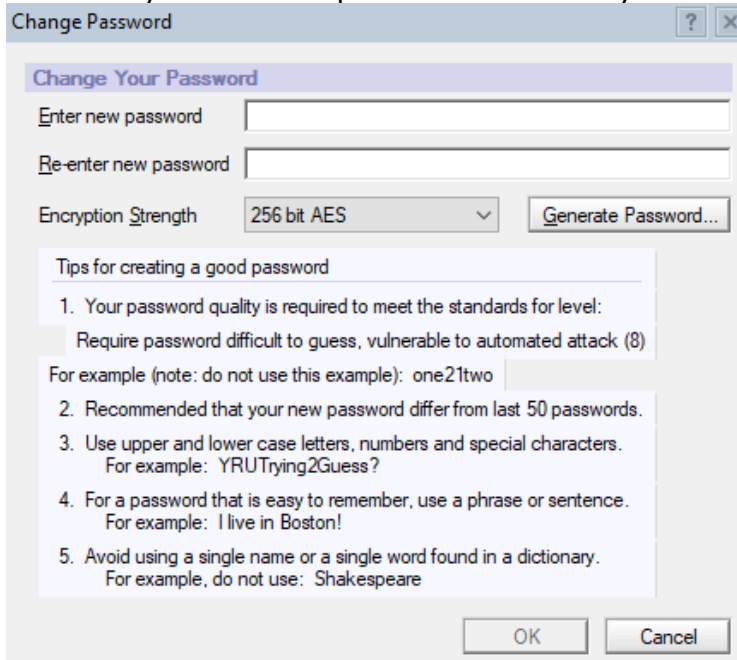
How to create a new password:

1. From your Replication Screen, click on File>Change Password:

Replication and Sync - IBM Notes



2. Enter your current password first and you will see the Change Password box:



3. Type your new password twice following the instructions under Tips. A message will pop up stating the change was successful.
4. Click on OK.

Local Databases

Databases that are used only by you and reside on your computer are called local databases. The local replica on your machine is kept up to date by the means of replication. In most scenarios the user will want to work on their local database.

Benefits of using local databases are:

Processes generally move more quickly working locally, and if, for some reason, the servers are down, those working only on servers will have to wait until the server is back up and running.

Server Databases

The databases are also stored on servers and are called shared databases. They are accessible by all users of the system.

The server's names that you may become familiar with are:

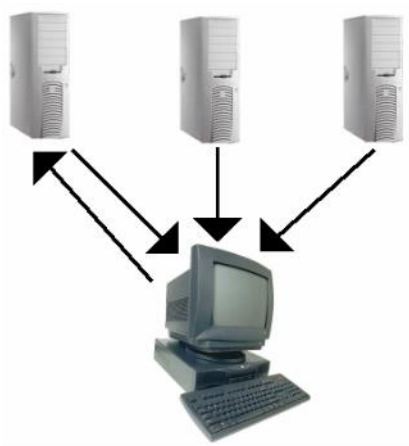


Dogwood

Eagle

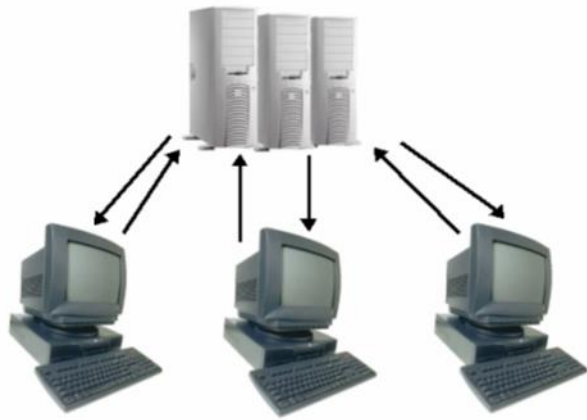
Sharing Your Data

Replication is the process of sharing data between computers and servers. Each of the servers has your databases stored on them. They "talk to" or replicate their information with the databases on your machine.



Replication Cycle

In the same way that you are replicating, all of your co-workers are sending their data to the servers and receiving changes as well to keep data up-to-date through a complete replication cycle. The system replicates every 10 minutes when you are in the office and/or if you are connected wirelessly to a network.



The Replicator Page as your Start up screen


The Replicator page lets you manage replication of all your local databases.

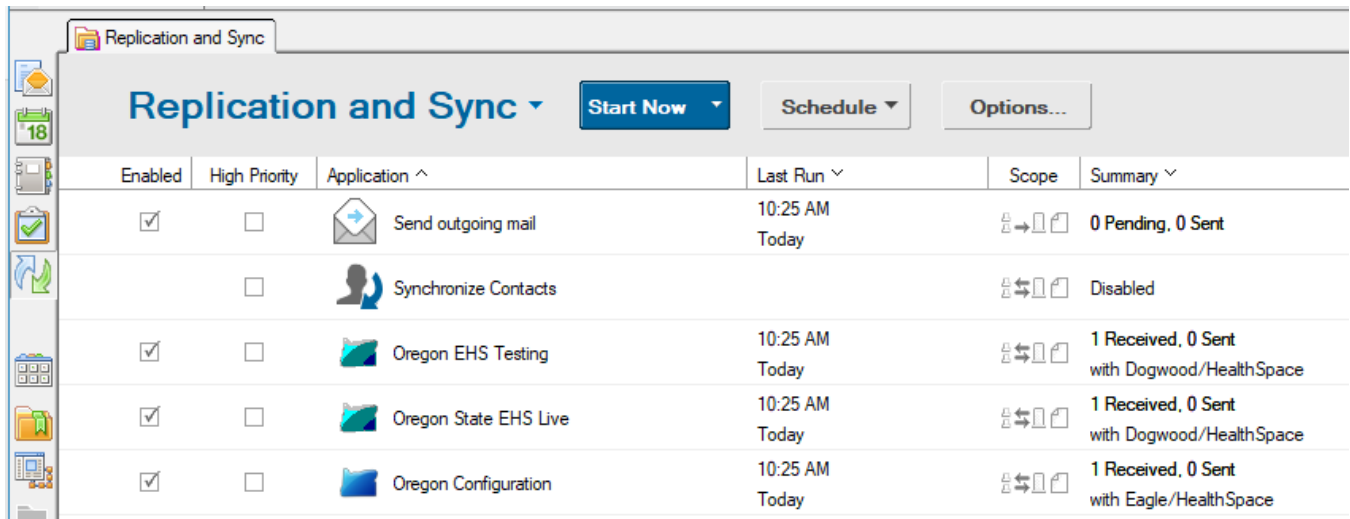
This page has been set up as the starting point when opening the Notes application. This allows you to see the initial replication of the data the first time you open for the day to be sure a full replication cycle of your Live data has occurred before opening the database.











Be sure to let it finish replicating completely before opening your database each day.






Understanding the replicator page:

1. The default should be the Replication screen, or you can click on the Replication Bookmark:  in the left hand icon menu.



Enabled	High Priority	Application ^	Last Run v	Scope	Summary v
<input checked="" type="checkbox"/>	<input type="checkbox"/>	 Send outgoing mail	10:25 AM Today		0 Pending, 0 Sent
<input type="checkbox"/>	<input type="checkbox"/>	 Synchronize Contacts			Disabled
<input checked="" type="checkbox"/>	<input type="checkbox"/>	 Oregon EHS Testing	10:25 AM Today		1 Received, 0 Sent with Dogwood/HealthSpace
<input checked="" type="checkbox"/>	<input type="checkbox"/>	 Oregon State EHS Live	10:25 AM Today		1 Received, 0 Sent with Dogwood/HealthSpace
<input checked="" type="checkbox"/>	<input type="checkbox"/>	 Oregon Configuration	10:25 AM Today		1 Received, 0 Sent with Eagle/HealthSpace

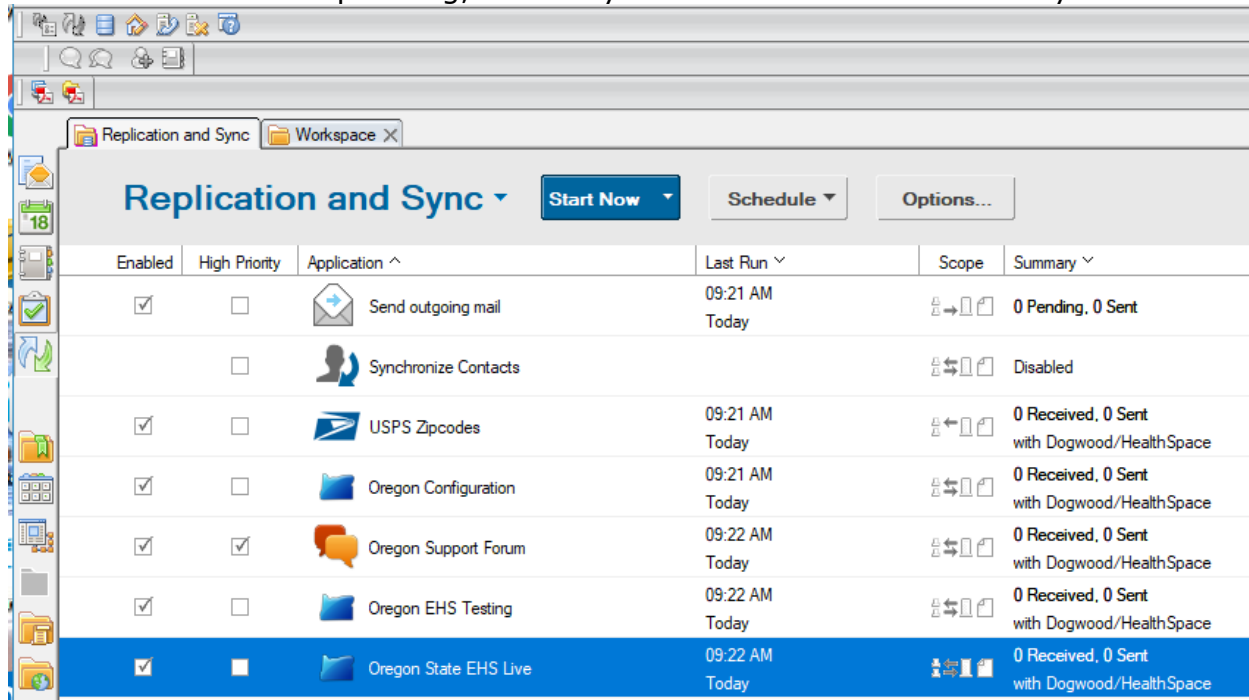
2. You can determine the order in which databases replicate by dragging the entries into a different sequence so that they replicate in a different order.
3. For a database to replicate, the box on the left side of each entry must be checked as Enabled:

☒
4. The arrows in the "Scope" column indicate data that is being sent and/or received from the servers:

5. The Summary shows whether replication was successful or failed, and the number of documents sent and received.

 1 Received, 0 Sent
with Dogwood/HealthSpace

Getting Started

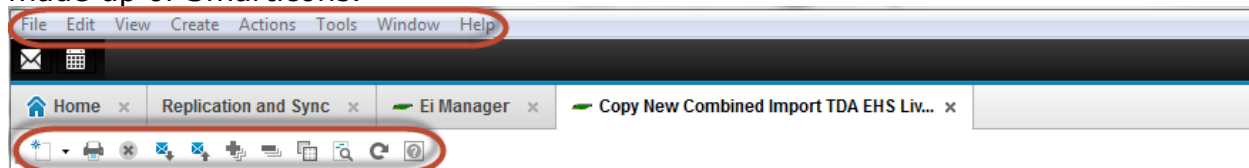
Opening your database

After it has finished replicating, click on your Live database to view all your data:



Toolbar and Smarticons

The Toolbar in the views contain drop-down menus like File, Edit, and Create. It is also made up of Smarticons.



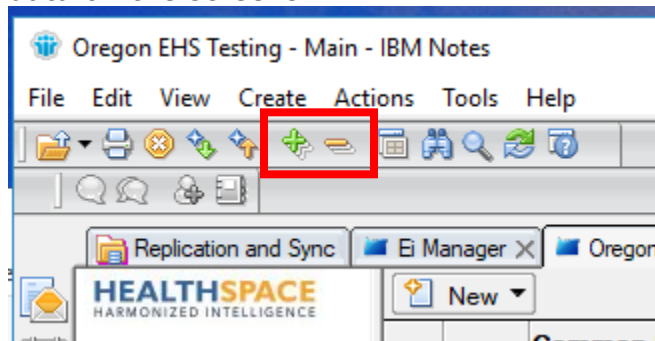
Smarticon

Each Smarticon performs an action when clicked (for example: italicizing selected text). For many tasks, it's faster to click a Smarticon than to use drop-down menus.

When working in your database, you can find out what a Smarticon does by hovering the mouse pointer over it without clicking. A tool tip will pop up and tell you the name of the icon.

Expand and Collapse Buttons

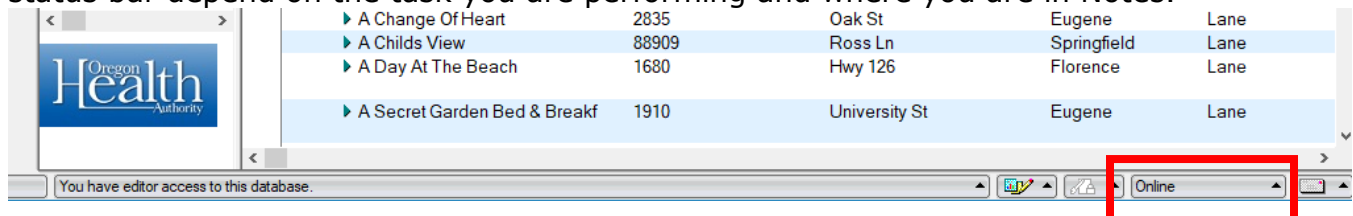
These plus and minus Smarticons help you expand and collapse categories, document "families" folders or views. You will use these icons frequently to look at more or less data on the screens.



Status Bar

The status bar appears at the bottom of the Notes main window. As you work in Notes, system messages and features appear in the status bar.

The status bar is context-sensitive, meaning the messages and features that appear in the status bar depend on the task you are performing and where you are in Notes.



An important item to check is to be sure you are Online so that the system will replicate routinely with the servers.

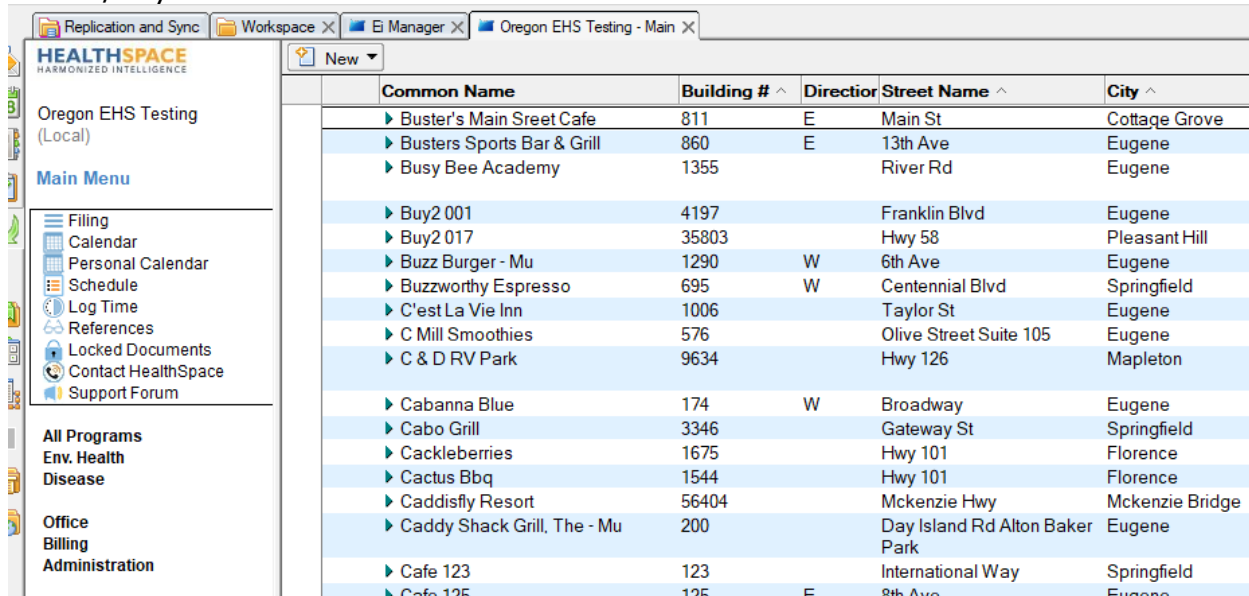
Views

To understand what a view is, it is first important to know that a database is a collection of documents, folders, and views. In general, it is any organized collection of information. A View is a list of documents within this database.

Database View

In EHS, databases are structured to show documents as **Parent (Physical Location)** or **Child (Facility)** documents.

In this main menu view, you see main documents listed which are called the Parent/Physical Location Documents:



Common Name	Building #	Director	Street Name	City
▶ Buster's Main Sreet Cafe	811	E	Main St	Cottage Grove
▶ Busters Sports Bar & Grill	860	E	13th Ave	Eugene
▶ Busy Bee Academy	1355		River Rd	Eugene
▶ Buy2 001	4197		Franklin Blvd	Eugene
▶ Buy2 017	35803		Hwy 58	Pleasant Hill
▶ Buzz Burger - Mu	1290	W	6th Ave	Eugene
▶ Buzzworthy Espresso	695	W	Centennial Blvd	Springfield
▶ C'est La Vie Inn	1006		Taylor St	Eugene
▶ C Mill Smoothies	576		Olive Street Suite 105	Eugene
▶ C & D RV Park	9634		Hwy 126	Mapleton
▶ Cabanna Blue	174	W	Broadway	Eugene
▶ Cabo Grill	3346		Gateway St	Springfield
▶ Cackleberries	1675		Hwy 101	Florence
▶ Cactus Bbq	1544		Hwy 101	Florence
▶ Caddisfly Resort	56404		Mckenzie Hwy	Mckenzie Bridge
▶ Caddy Shack Grill, The - Mu	200		Day Island Rd Alton Baker Park	Eugene
▶ Cafe 123	123		International Way	Springfield
▶ Cafe 125	125	E	8th Ave	Eugene



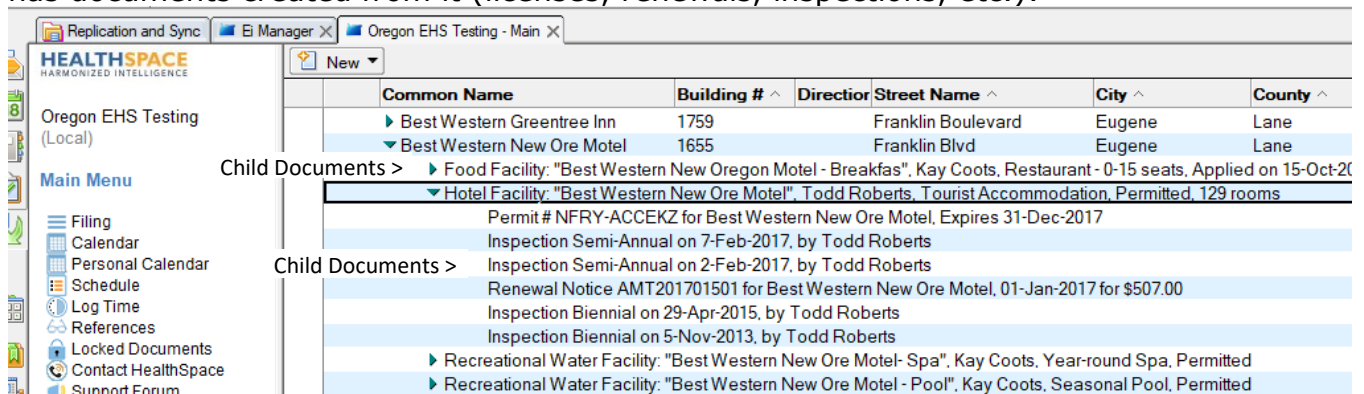
The green arrow in front of each item (called a twistie) signifies that there are documents listed underneath, called Child/Facility documents



How to view child documents:

Documents shown by expanding a twistie are called child documents. They are created from, and remain associated with, the parent document.

A child document, as shown in this view may also have "twisties," indicating that it too has documents created from it (licenses, renewals, inspections, etc.):



Common Name	Building #	Director	Street Name	City	County
▶ Best Western Greentree Inn	1759		Franklin Boulevard	Eugene	Lane
▶ Best Western New Ore Motel	1655		Franklin Blvd	Eugene	Lane
Child Documents > ▶ Food Facility: "Best Western New Oregon Motel - Breakfast", Kay Coots, Restaurant - 0-15 seats, Applied on 15-Oct-2017					
▶ Hotel Facility: "Best Western New Ore Motel", Todd Roberts, Tourist Accommodation, Permitted, 129 rooms					
Permit # NFRY-ACCEKZ for Best Western New Ore Motel, Expires 31-Dec-2017					
Inspection Semi-Annual on 7-Feb-2017, by Todd Roberts					
Child Documents > Inspection Semi-Annual on 2-Feb-2017, by Todd Roberts					
Renewal Notice AMT201701501 for Best Western New Ore Motel, 01-Jan-2017 for \$507.00					
Inspection Biennial on 29-Apr-2015, by Todd Roberts					
Inspection Biennial on 5-Nov-2013, by Todd Roberts					
▶ Recreational Water Facility: "Best Western New Ore Motel- Spa", Kay Coots, Year-round Spa, Permitted					
▶ Recreational Water Facility: "Best Western New Ore Motel- Pool", Kay Coots, Seasonal Pool, Permitted					

Database Structure

Becoming familiar with the structure of the database will help you when searching for specific documents.

All documentation stems or "hangs" from the Physical Location document. Double clicking on a document in the view will open it. Clicking on the twistie will show all documents associated with that location.

Each building will have its own **Physical Location** document. The facilities inside this Physical Location will have their own **Facility** documents. A Facility may have **Child Documents**, such as inspections, licenses or complaints.

Parent/Physical Location	→	Common Name	Building # ^	Director	Street N.
Facility Documents	→	▼ Best Western Pier Point Inn	85625		Hwy 101
	→	▶ Food Facility: "Best Western Pier Point Inn - Breakfast", Sarah Pu			
Child Documents	→	▼ Hotel Facility: "Best Western Pier Point Inn", Sarah Puls, Tourist /			
		Permit # NFRY-ACCEND for Best Western Pier Point Inn, E			
		Renewal Notice AMT201701464 for Best Western Pier Poir			
		Inspection Biennial on 19-Nov-2013, by Zack Manning, Reh			
		Complaint : Received on 28-Jun-2005 - Closed			
		▶ Recreational Water Facility: "Best Western Pier Point Inn - Pool",			
		▶ Recreational Water Facility: "Best Western Pier Point Inn Spa A",			
		▶ Recreational Water Facility: "Best Western Pier Point Inn Spa B",			

Manipulating Views

Sortable Columns

The views can be manipulated in ways that will help you make more efficient use of columns.

If a column title has a ^ or v next to it, it is a sortable column.

Common Name	Building # ^	Director	Street Name ^	City ^	County ^	Licensee ^
▼ Best Western Grand Manor Inn	971		Kruse Way	Springfield	Lane	Jasvir Dhaliw
▶ Food Facility: "Best Western Grand Manor", Amy Bleekman, Rehs, Restaurant - 16-50 Seats, Applied on 13-Jan-201						
▶ Hotel Facility: "Best Western Grand Manor Inn", Amy Bleekman, Rehs, Tourist Accommodation, Permitted, 65 rooms						
▶ Recreational Water Facility: "Best Western Grand Manor", Amy Bleekman, Rehs, Seasonal Pool, Permitted						

On default the view is categorized by the Physical Location, Common Name. To change this, just click on the column heading that you would like to sort by. Remember the 'type to search' function won't work if you are sorted by a column other than Common Name.

Arrange Columns

Another feature of the views in your database is that you can use the "drag and drop" feature to move columns around if you want to see columns in a different order.

Simply click and hold the column heading, move your mouse until your column is in the desired location, and release the mouse button.

Customizing Views

By customizing views, you can hide columns on your local database. This can help when dealing with very large views, or for creating reports where only specific information is required.



How to customize the view:

1. Click on "View", "Customize this View...".

This brings up a window to choose which columns to de-select in the view.

Customize View: Properties\With Food Permits Only

Visible	Name	Sort	Width	Resizable
<input checked="" type="checkbox"/>	Common Name	None	25	Yes
<input checked="" type="checkbox"/>	City	None	10	Yes
<input checked="" type="checkbox"/>	Building #	None	8	Yes
<input checked="" type="checkbox"/>	Direction		5	Yes
<input checked="" type="checkbox"/>	Street Name	None	15	Yes
<input checked="" type="checkbox"/>	County	None	10	Yes

Selected Column: Sort None Width 25 ☐ Use abbreviated dates

Row spacing 1 Lines per row 5 ☒ Shrink rows to content

Check the columns you would like to display in this view. Use the Move Up and Move Down buttons to reorder (left to right) the columns.

OK Cancel

2. Choose "OK" when you have finished customization.



How to restore the defaults:

1. To restore the defaults, go back to "View", "Customize this View".
2. Click on the defaults button.

Customize View: Properties\With Food Permits Only

Columns to Display

Visible	Name	Sort	Width	Resizable
<input checked="" type="checkbox"/>	Common Name	None	25	Yes
<input checked="" type="checkbox"/>	City	None	10	Yes
<input checked="" type="checkbox"/>	Building #	None	8	Yes
<input checked="" type="checkbox"/>	Direction		5	Yes
<input checked="" type="checkbox"/>	Street Name	None	15	Yes
<input checked="" type="checkbox"/>	County	None	10	Yes

Move Up ↑
Move Down ↓
☐ Show all
Defaults

Selected Column: Sort **None** Width **25** ☐ Use abbreviated dates

Entire View

Row spacing **1** Lines per row **5** ☒ Shrink rows to content

Check the columns you would like to display in this view. Use the Move Up and Move Down buttons to reorder (left to right) the columns.

OK Cancel

As you can see from the dialogue box for customizing the view, there are more options to choose from.

3. Try experimenting in Oregon EHS Testing database to see what different views can do for you.

Fields on Forms

Think of a document within an EnviroIntel database as a record, but the document is more sophisticated than a typical database record, containing rich text, pictures, objects, and many other types of information.

Information is entered into "Fields" of various types. Once saved and closed this document will appear in one or more views.

Attachments



Some reminders when adding attachments and importing images:

- ✓ **Attach only black and white pdf or .jpg files** to keep the system from getting bloated
- ✓ **Use attachments where you can rather than importing images.**
Attached documents do not open the image when opening the form, whereas an imported image must load each time the form opens causing the system to slow down.
- ✓ **Save the files in a JPEG or GIF format before attaching.**
BMP images are much larger and will cause the database to become bloated.
- ✓ **If you are not sure of the size of your document, check the properties of the image.**
If it is larger than a megabyte you should think about re scanning the document before attaching.

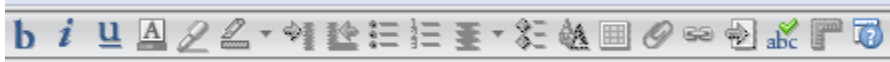
The larger the attachments and images in your system, the longer the documents take to open, and the slower your system will run.



How to add Attachments:

1. Click in the Field where you would like to attach the file. Frequently this is a 'comments' field

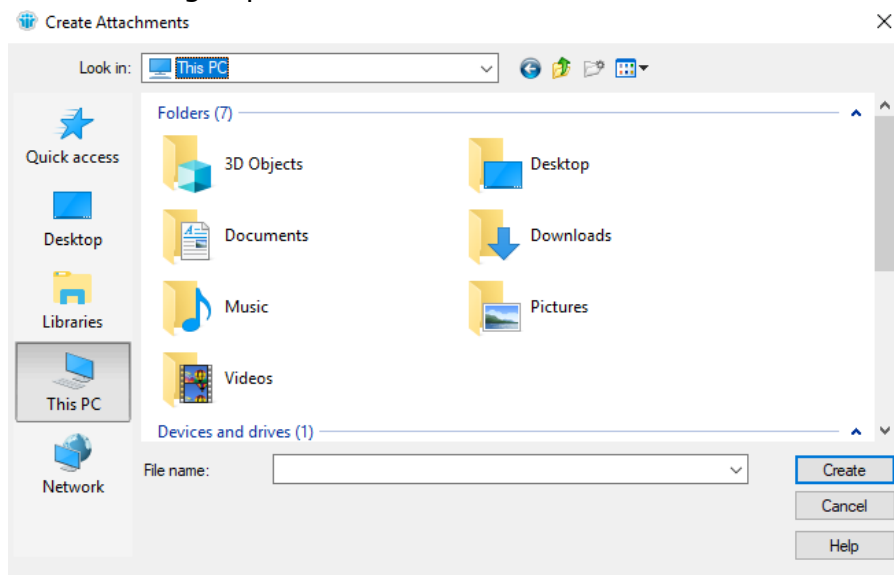
The formatting buttons will become active.



Click on the attachment button:



2. This brings up the create attachment box:



Browse until you find the file you would like to attach.

3. After selecting the file you want to attach, click on the "Create" button and it will show the file icon in the field.

Date Ranges



To specify a date on a form:

1. Click the date icon to open the date picker.



2. To move back or forward one month, click on the arrows in the top corners of the date picker.

3. Click on the day you want when the month is correct.

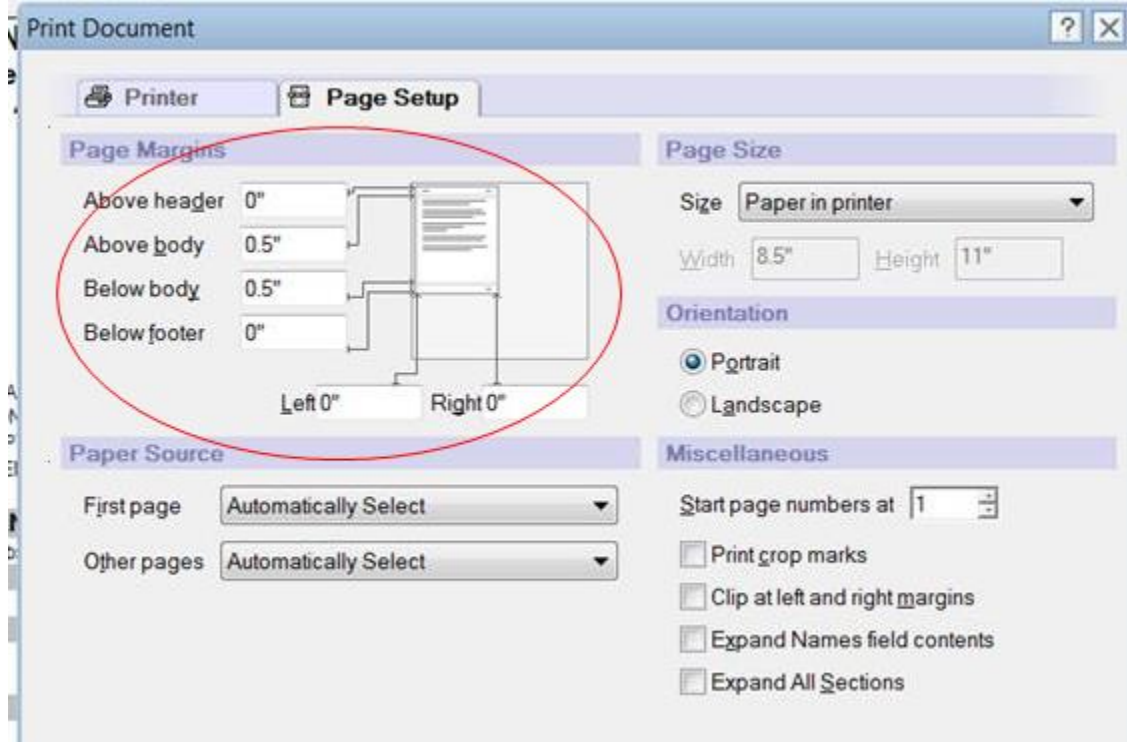
When typing the date into the field, use any format and the program will convert it.

Configurable Settings

The Primary Administrative Contact (PAC) for your Area manages these configurable settings. If you have questions about the configuration of the program or settings that do not meet your requirements, contact your PAC who can adjust configurable settings.

Printing

You will have to experiment with the printer settings that give you the best results with regards to margins for your inspection reports, renewals and licenses. For most counties, setting your margins in Page Setup to 0, .5, .5 and 0 works best:





How to print views or documents:

1. Select the entries that you want to print and choose Print from the File menu.

Common Name	City	Building #	Direction
Chum's Store	Clarksville	811	
Circle J Ranch	Indian Mound	4832	
Circle K #2720402	Clarksville	560	
Circle K #2720407	Clarksville	1874	
Circle K #2720443	Clarksville	648	
Circle K #2720463	Clarksville	301	

Food Facility: "Circle K #2720463", Ricky Young, Category 1 - Category 1, Applied

Inspection Regular on 20-Dec-2014, by Alison Walls

Inspection Regular on 19-Sep-2014, by Ricky Young

Inspection Regular on 6-May-2014, by Ricky Young

Inspection Regular on 12-Apr-2013, by Ed Watson

Inspection Regular on 20-Dec-2012, by Ricky Young

Inspection Regular on 7-Jun-2012, by Alison Walls

Inspection Regular on 25-Apr-2012, by Ed Watson

Inspection Regular on 15-Jun-2011, by Ricky Young

Weights & Measures Facility: "Circle K #2720463", Ricky Young, Market With Deli, F

When the dialogue box comes up you have the option to print the documents that you have selected or to print the selected view. When you choose to print the view, the column headings also print. Documents can be printed from the file menu from the view or with the document open.

Print View

Printer: HP Officejet Pro 8600 (Network)

Status: Ready
Type: HP Officejet Pro 8600 (on CN37QD2HDF05KD)
Comment:
Location:

Print Style: [Dropdown]
Other Options: [Dropdown]

What to Print: [Radio buttons for printing options]

Print Quality: [Checkboxes for print quality options]

Print Range: [Radio buttons for print range options]

Copies: Number of copies: 1 [Collate copies checkbox]

OK Preview... Cancel

Searching Views

To find a record, just start typing anywhere in the main screen and it will pop the record to the top (the 'starts with' search).

Advanced Searching

There are three types of searches that enable you to find information you specify, including text, documents, databases, people's names, and much more.

The search features are:

- Starts With Search (most commonly used)
- Find/Replace
- Full-text Search

"Starts with" Search

When looking at a view, you can quickly find a document or category.



To do a "Starts with" search:

1. Click anywhere inside the view.
2. Type part of the word you want to search for. For example: "r", or "raj".

Building # ^	Direction	Street Name / Type ^	City ^
Starts with...			
Search text r			Clarksville
			Clarksville
			Clarksville
			Clarksville
			Clarksville
			Clarksville
400		Lowe's Dr	Clarksville
998		Solar Way	Clarksville
161	W	Dunbar Cave Rd	Clarksville
330		Warfield Blvd	Clarksville

The view will jump to the first entry which starts with "R".

HEALTHSPACE
HARMONIZED INTELLIGENCE

Live

Food

Food Facilities
By Status
By Type
By Priority
By Assigned
By Tax Map
By Locality
By Jurisdiction
By Expiring Interm
By Franchise

New Physical Location			
	Common Name ^	City ^	Building #
▶	Rajun Cajun Seafood	Clarksville	701
▶	Rhino Mart	Clarksville	599
▶	Rite Aid #11867	Clarksville	1493
▶	Rite Aid #11868	Clarksville	1128
▶	Rite Aid #4055	Clarksville	498
▶	Road Trip	Clarksville	2249
▶	Sam's Club #6512	Clarksville	3315

Find/Replace

You can quickly and easily search for a word in a view or document using the Find/Replace button which looks like a binocular.



Notice:

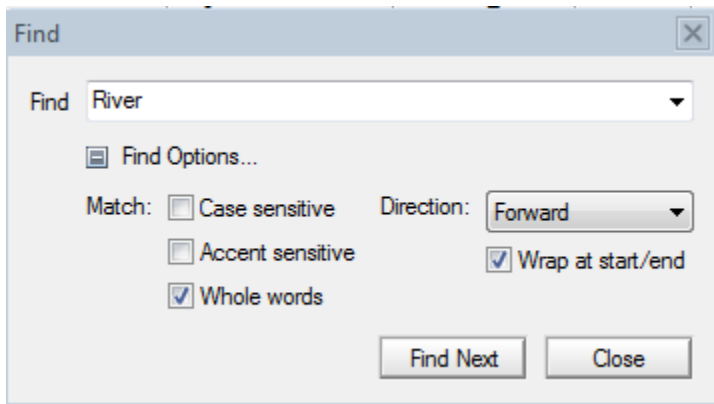
Using the Find/Replace button in a view, finds the text in the view only, but does not search the document itself.

You can also use <Ctrl> + <F> when in a document or view to use this search.

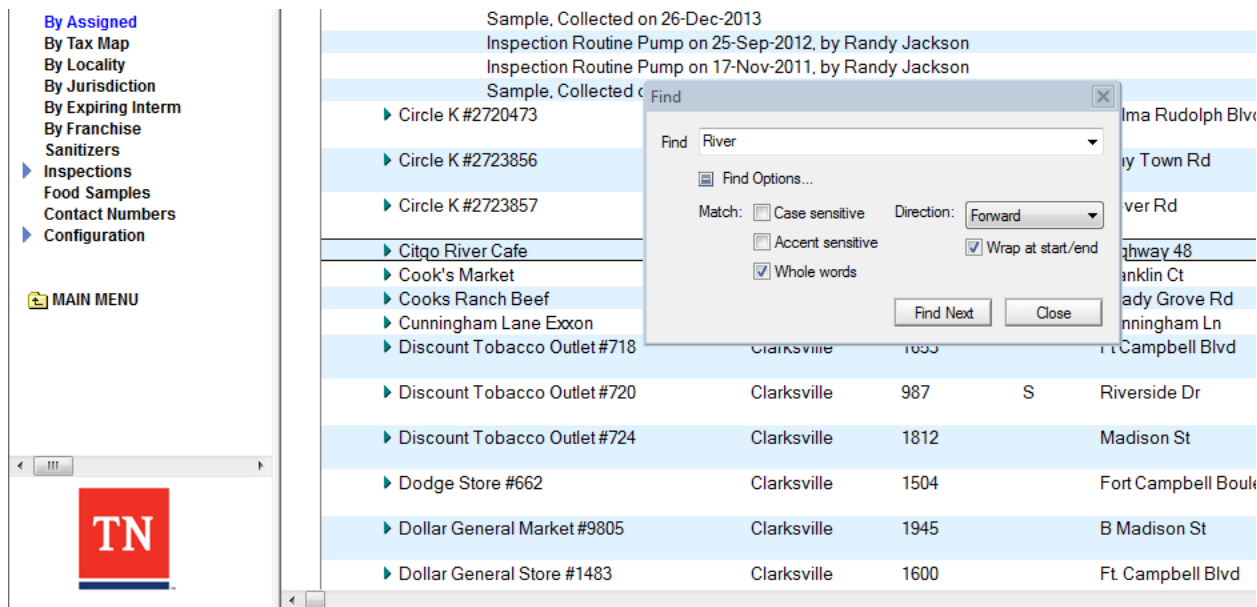


To do a "Find/Replace" search:

1. Click on the Find/Replace button.
2. Enter the text you want to find in the dialog box that appears.



- Click "Find Next" or just hit <Enter>. This will find the first occasion of the word in the document or in a view.



- Continue to click next or enter to see each time the word is used in the document.

Full-Text Search

When you are working in a view, you can find text in a document with the Full-text search. It appears as a magnifying glass.

Using this type of search on an indexed database gives you a powerful tool for searching through your entire database for precise information that may appear in a view or in a document.

For example:
Search for "River".

New Physical Location

Search in View 'Properties\With Food Permits Only'

Show results

Sorted like current view

Indexed

Search for

River

Search

	Common Name ^	City ^	Building # ^	Direction	Street Name ^	County ^	Tel. # ^	Licenses
	▶ 4 Seasons Market	Clarksville	1860		Wilma Rudolph Blvd	Montgomery	(931) 933-8025	Simms Incorp
	▶ 41-a Market	Clarksville	4450		Highway 41-a	Montgomery	(931) 368-9691	Mesei
	41-a Market	Clarksville	4450		Highway 41-a	Montgomery	(931) 368-9691	Mesei
	▶ A F C Sushi@ Publix #1392	Clarksville	1771		Madison St	Montgomery	(931) 551-7031	Advan

The search found 32 documents in the current view containing the word "River".

New Physical Location					
32 results in 'PropertiesWith Food Permits Only'. Show res					
Search for River					
	Common Name ^	City ^	Building # ^	Direction	Street Name ^
✓	▶ Citgo River Cafe	Clarksville	2035		Highway 48
✓	▶ Food Facility: "Citgo River Cafe", Ricky Young, Category 1 - Category 1, Applied on 27-Aug-2007, Permitted				
✓	Inspection Regular on 22-Aug-2014, by Ricky Young				
✓	Inspection Regular on 10-Mar-2014, by Alison Walls				
✓	Inspection Regular on 14-Feb-2014, by Ricky Young				
✓	Inspection Regular on 8-Sep-2013, by Ricky Young				
✓	Inspection Regular on 2-May-2013, by Ricky Young				
✓	Inspection Regular on 7-Dec-2012, by Alison Walls				
✓	Inspection Regular on 30-Mar-2012, by Ricky Young				
✓	Inspection Regular on 28-Nov-2011, by Ricky Young				
✓	▶ Weights & Measures Facility: "Citgo River Cafe", Ricky Young, Market With Deli, Pump - Standard Flow, Perr				
✓	Inspection Routine Pump on 23-Oct-2015, by Randy Jackson				
✓	Sample, Collected on 22-Oct-2015				
✓	Inspection Followup Pump on 3-Dec-2014, by Randy Jackson				
✓	Inspection Routine Pump on 29-Sep-2014, by Randy Jackson				
✓	Sample, Collected on 29-Sep-2014				
✓	Sample, Collected on 29-Sep-2014				
✓	Inspection Complaint Pump on 6-May-2014, by Randy Jackson				
✓	Inspection Routine Pump on 31-Jan-2014, by Randy Jackson				
✓	Sample, Collected on 31-Jan-2014				
✓	Sample, Collected on 31-Jan-2014				
✓	Inspection Routine Pump on 27-Aug-2012, by Randy Jackson				
✓	Inspection Routine Pump on 23-Aug-2011, by Randy Jackson				
✓	Sample, Collected on 23-Aug-2011				

Operators

On an indexed database, certain words called operators, in the search criteria, act as instructions.

AND, OR, NOT, used in combination with the words you are searching for will give you more defined choices.

OR Operator

Search for criteria a or b in the database.

For example:

"John OR Mike" - the search will find all documents that contain the name John or Mike.

AND Operator

Search for documents, which contain criteria a and b in the database.

For example:

"Playground AND John" - the search will find all documents which contain the word playground and John.

NOT Operator

Search for documents, which contain criteria "a" but not "b."

For example:

"inspection NOT food" - the search will find all inspection documents except food inspections.

Physical Location

During this chapter you will learn about the Structure of the EnviroIntel EHS database and the importance of the Physical Location Document.

Database Structure

The Main view shows the relationship between the documents. The top level document is called a "Parent" document. When a "twistie" is expanded you can see the documents one level below the "Parent". Each one is a "Child" document to the parent.

Oregon EHS Testing - Main X						
New ▾						
	Common Name	Building # ^	Director	Street Name ^	City ^	County ^
▼	Best Western Grand Manor Inn	971		Kruse Way	Springfield	Lane
▶	Food Facility: "Best Western Grand Manor", Amy Bleekman, Rehs, Restaurant - 16-50 Seats, Applied c					
▶	Hotel Facility: "Best Western Grand Manor Inn", Amy Bleekman, Rehs, Tourist Accommodation, Permit					
▶	Recreational Water Facility: "Best Western Grand Manor", Amy Bleekman, Rehs, Seasonal Pool, Pern					

For example:

The Best Western Grand Manor Inn above is the Physical Location at 971 Kruse Way.

From it hangs child documents, such as food, hotel, pool and spa facilities.

Under these child/facility level twisties are more child documents such as Inspections, Renewals and Permits/Licenses.

All documents that are associated with its Parent document are categorized together, in a similar way to a filing system with all documentation "hanging" from the Physical Location document.

Physical Location Document

One way we can describe the Physical Location is that it is the building that houses various types of establishments. For instance, before we can open a hotel facility we need to have a building to put it into.



Once a Physical Location document is completed, all associated facilities (for hotel, pool, spa and/or food service) are created from this document.



Finding the Physical Location associated with a facility

If you know the address of the facility and location, name of the Physical Location use the "Starts with Search" to find the street address to see if it already exists in the database.

1. To do this, first sort on the building number or street name to sort the view. Scroll through the list to see if you have any addresses in the database that match the address of the facility that you need to enter into the system.

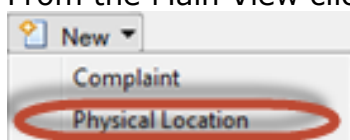
If there is a matching address, you do not need to enter a new Physical Location and you can skip to Creating a New Facility

2. If there isn't an address match, you will need to create a new Physical Location.



How to create a new Physical Location:

1. From the Main View click on the "New" button, then choose "Physical Location":



A new Physical Location form will open.

Identification			
Common Name	Region	Sewage System Jurisdiction	Health Office
<input type="text"/>	<input type="text"/>	<input type="radio"/> Private <input type="radio"/> Public <input type="radio"/> None	<input type="text"/>
Water System Jurisdiction			
<input type="radio"/> Private <input type="radio"/> Public <input type="radio"/> None			

Legal Description		
CLT Map #	Index	Group
<input type="text"/>	<input type="text"/>	<input type="text"/>
Parcel #	Subdivision	Size Of Lot
<input type="text"/>	<input type="text"/>	<input type="text"/>

Global Position			
Latitude	Degrees	Minutes	Seconds
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Decimal		
Longitude	Degrees	Minutes	Seconds
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Decimal		
Altitude	<input type="text"/>		
ISO6709		<input type="checkbox"/> Verified	Open in Google Earth

Owner Information	
<input type="button" value="New"/>	<input type="button" value="Choose Existing"/>
*Choose from the existing owners first. If not listed create a new owner.	

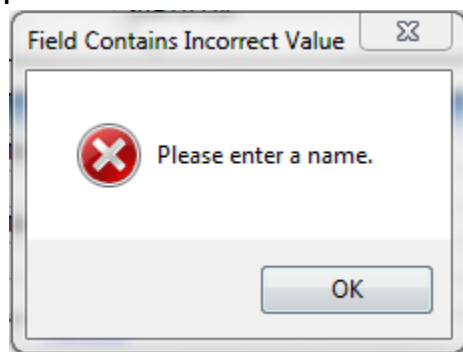
Contact Information for Physical Location			
Site Address		Building Contact	
Building #	Direction	Street Name	Type Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Zip Code	City	County	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Country	Directions		
<input type="text"/>	<input type="text"/>		

When the Physical Location Form opens, you can see that the form breaks up into tables, categorizing the information.

The other thing you will notice is that on the form there are some fields that have red arrows next to them that must have a value entered. These are called mandatory fields:



If you are to save the document without the required fields filled in, you will get a prompt to enter a value into the field:



Fields with orange arrows:



Indicate the information is important though not required.

Physical Location Tables

Let's take a brief look at each table on the Physical Location form.

The tables are as follows:

- Identification
- Legal Description
- Global Position
- Licensee
- Contact Information for Physical Information

Identification

The first table is the Identification Table.

It contains Information used for identifying the Location.

Identification			
Common Name [Red Arrow]	Region [Dropdown]	Sewage System Jurisdiction <input type="radio"/> Private <input type="radio"/> Public <input type="radio"/> None	Health Office [Red Arrow]
Water System Jurisdiction <input type="radio"/> Private <input type="radio"/> Public <input type="radio"/> None			

Tips about "The Common Name"

Consistency with naming your Physical Locations is important for future searching and organization of data.

Here are some guidelines that may help you to determine the Common Name of your Physical Location:



Guidelines for the Common Name:

- ✓ If the building has a name like the "Sterling Building" or the "Rest Easy Hotel" use that name.
- ✓ Use the establishment name if it stands alone in its own building.
- ✓ If the building has more than one facility in it, use the name of the most prominent facility.
- ✓ Give the Physical Location the name of a store or gas station if the facility is run from inside the establishment.
- ✓ If there is no name for the facility, use the street address.
- ✓ If there are none of the above, such as in the case of a logging camp, use a name that would indicate the location.
- ✓ A close intersection, name of the field, or even a global position.
- ✓ Use Title Case for Physical Location and Facility Names. Example: The Big Mall, The Donut Factory, Rainbow Kid's Daycare...

Whatever you choose, be sure that you determine the format and use this consistently.

Depending on the size of your organization, there will be many people who search for locations in the database.

Naming conventions that everyone understands will save time for all!

Legal Description

Captures information with regard to the property in this table. This is not a required field in Oregon and can be left blank.

Legal Description		
CLT Map # v	Index v	Group v
Parcel # v	Subdivision v	Size Of Lot v

Global Position

GPS locations can be entered on the Global Position table. This is not a required field in Oregon and can be left blank.

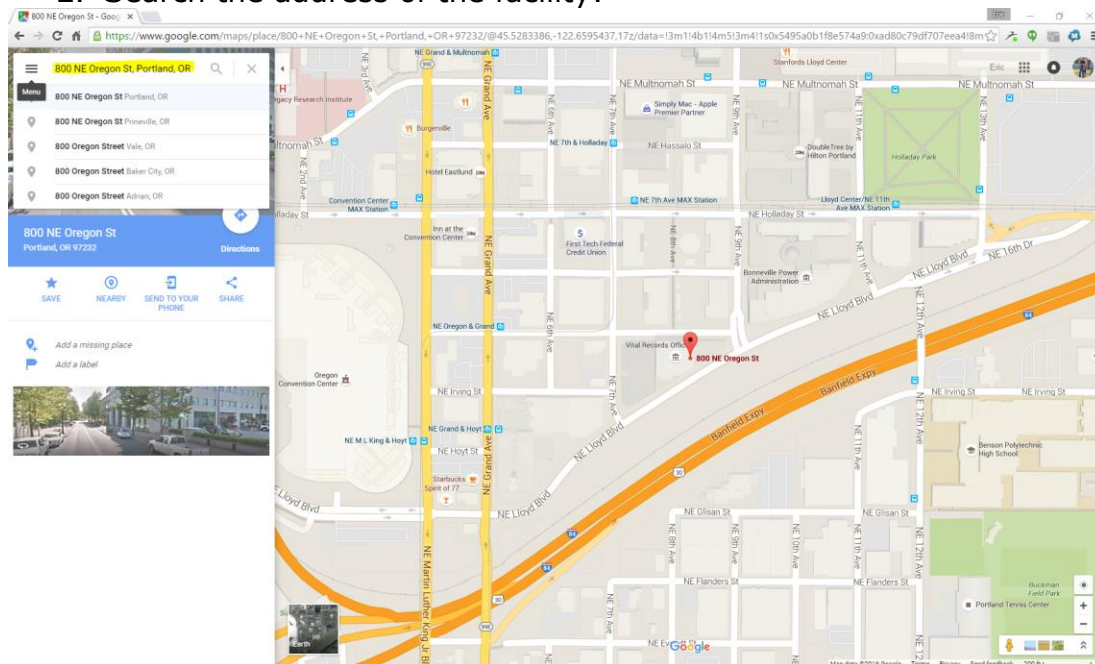
Global Position			
Latitude	Degrees <input type="text"/>	Minutes <input type="text"/>	Seconds <input type="text"/>
	Decimal		
Longitude	Degrees <input type="text"/>	Minutes <input type="text"/>	Seconds <input type="text"/>
	Decimal		
Altitude	<input type="text"/>		
ISO6709		<input type="checkbox"/> Verified	Open in Google Earth

Owner Information	
<input type="button" value="New"/>	<input type="button" value="Choose Existing"/> *Choose from the existing owners first. If not listed create a new owner.

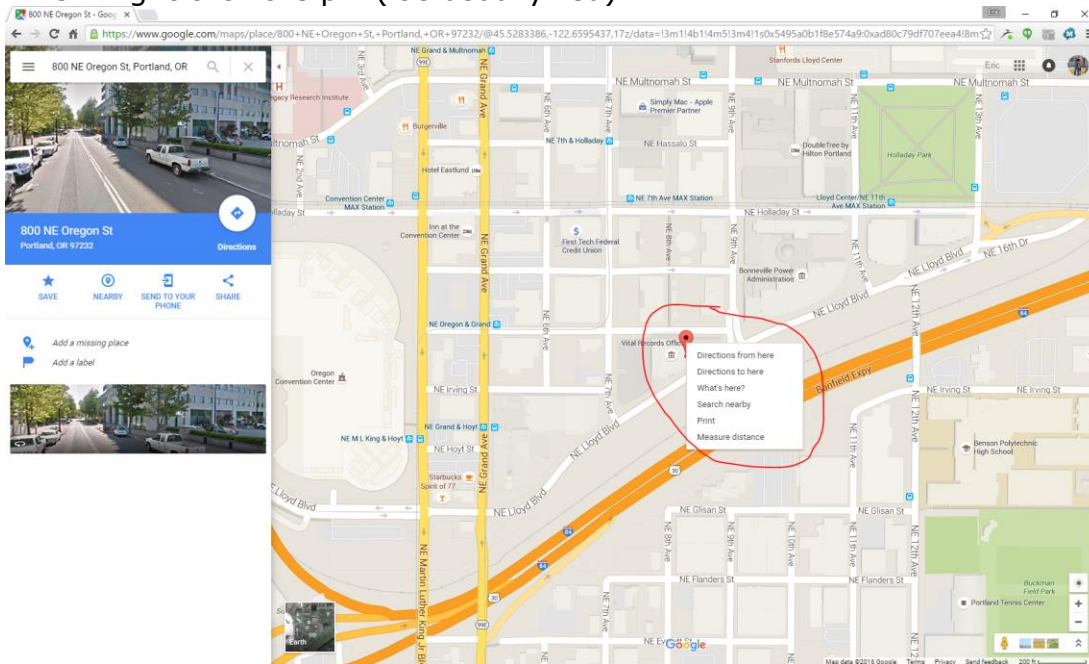
Contact Information for Physical Location			
Site Address		Building Contact	
Building # <input type="text"/>	Direction <input type="text"/>	Street Name <input type="text"/>	Type <input type="text"/>
			Suffix <input type="text"/>
Zip Code <input type="text"/>	City <input type="text"/>	County <input type="text"/>	State <input type="text"/>
Country <input type="text"/>	Directions <input type="text"/>		
USA		Anderson County	TN

However, if you want to enter this information, you can use Google Maps to help you:

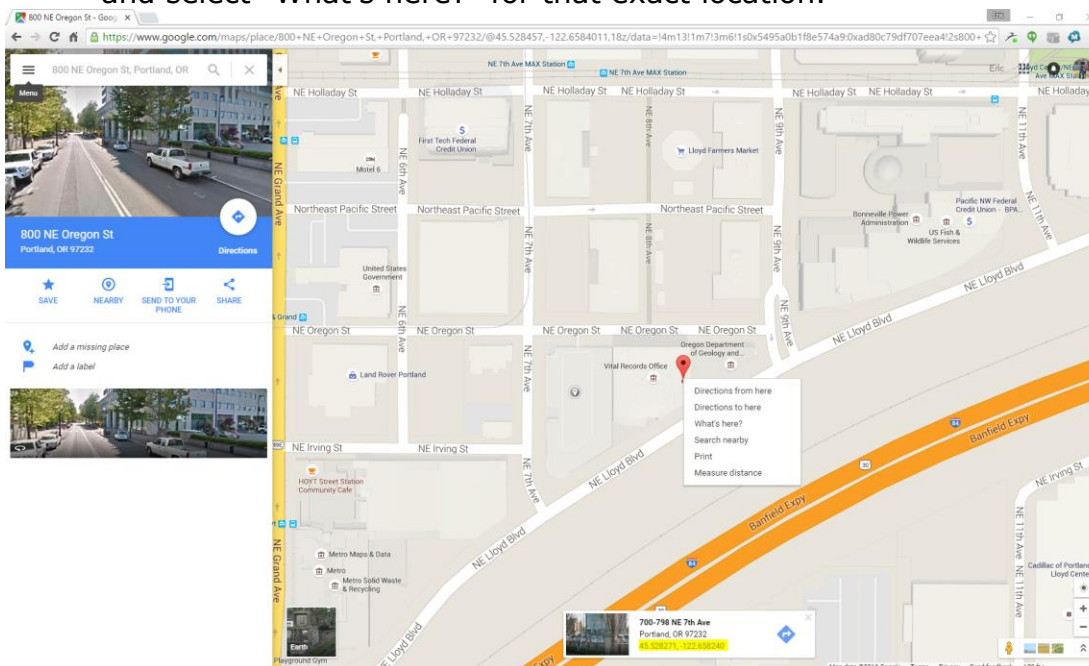
1. Open Google Maps on a web browser (maps.google.com)
2. Search the address of the facility:



3. Right click the pin (it's usually red):



4. Select "What's here?". At the bottom of the screen are the coordinates to where the pin is. If the pin is located incorrectly, you can right click anywhere on the map and select "What's here?" for that exact location.



Owner Information Table

For the Physical Location form we are interested in capturing information about the Owner of the building. This may not be the same as the Licensee of the establishment inside, so be sure that you are looking for the correct name.

Details are entered once on a Licensee document in the system. This info is then re-used for any other buildings or establishments in your database that has a common Licensee.

Not only does this save time during data-entry, but also allows you to track all establishments operated by one business entity.

Before you click on the "New" button to create another Owner form, check to see if the Owner exists in the database with the "Choose" button.



How to choose an existing Licensee/Owner:

1. Click on "Choose Existing".

This will bring up a list of all existing Licensee in the database, which you will want to search thoroughly first by name and then by address:

The screenshot shows a window titled "Owner" with a close button (X) in the top right corner. Inside the window, there is a text prompt "Please select the business that owns this" above a table. The table has five columns: "Name ^", "ID ^", "Address ^", "City ^", and "Tel. ^". The rows list various businesses, including "A & T Market", "Aamir Farhen", "Adel B. Basta", "Advance Auto Parts", "Advanced Fresh Concepts Franchise Corp.", "Air Gas", "Airgas Usa, Llc South Division", "Aldi Inc.", "Amer Massad", and "American Snuff Company Llc". To the right of the table are two buttons: "OK" and "Cancel".

Name ^	ID ^	Address ^	City ^	Tel. ^
A & T Market	NFRY-A7ANUC	1780 New Ashland	Clarksville	(931) 646-00
Aamir Farhen	NFRY-A7ANRX			()
Adel B. Basta	NFRY-A7ANTB	715 N 1st St	Pulaski	(731) 363-30
Advance Auto Parts	NFRY-A7ANXX		Roanoke	()
Advanced Fresh Concepts Franchise Corp.	NFRY-A7ANY2	19205 S Laurel Par	Rancho Dominguez	(310) 604-32
Air Gas	NFRY-A7ANVB	998 Solar Way	Clarksville	(931) 552-83
Airgas Usa, Llc South Division	NFRY-A7ANSR	PO BOX 9219	Marietta	(000) 000-00
Aldi Inc.	NFRY-A7ANYX	PO BOX 100	Gladeville	(615) 449-88
Amer Massad	NFRY-A7ANW5	360 Kraft St	Clarksville	(931) 802-67
American Snuff Company Llc	NFRY-A7ANUN	PO BOX 31149	Clarksville	(931) 920-62

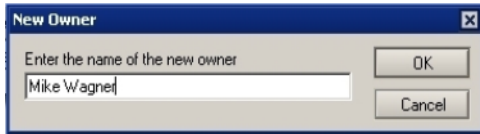
The list can be sorted by name for a "Starts with" search on the Owner, or you can simply scroll through the list.

2. Highlight the name and click on OK.
3. If you find that the Licensee is not in the database, click on the "Cancel" button to take you back to the Physical Location form.

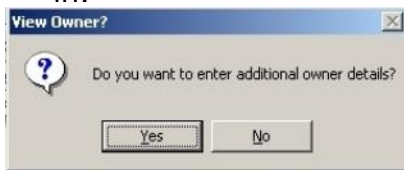


How to add a new Owner:

1. Click on "New" button to enter the name of the Licensee.
2. A box comes up for the Name, and when filled in another box asks if you would like to add further details.



3. By Choosing "Yes" you are taken to the Owner Form where these details can be filled in.



4. On the "Owner" form enter information about the (new) Owner of the Physical Location.
5. Click on Done to save and close the Business form.

Once the form is saved, you will notice that more buttons have been added to the Owner table: "Change", "View" "Open in Billing View".

- "View" opens the Business form so you can add more information if needed.
- The "Open in Billing View" button opens the Main billing view to the name of the Owner.
- This Owner will now be added to the existing list and can be reused by selecting "Choose".

Licensing

Once you have completed a new "Physical Location", you can then create a new Facility Form. This section will look at the Food Facility and its tables.

Creating a New Food Facility

The Facility Form is the central form in the database. It holds information about the type of operation, its permit status, the owner name and contact information. It is the form from which inspection schedules are driven and billing is run.

Your first step will be to search for an existing Physical Location.

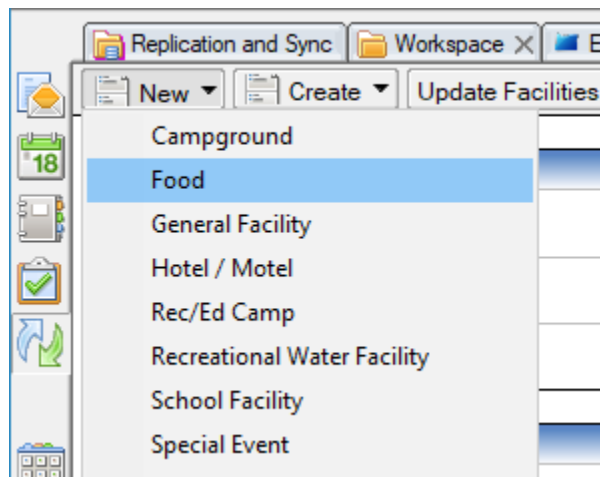
Open the Main Filing view and look for the Physical Location's name. If you can't find the name try to find the Physical Location with its address. Sort the view by address. With a "Starts with" search, look for the Physical Location's address.

If you still can't find the specific Physical Location create a new document.



How to add a new Food Facility:

1. Open the Physical Location form.
2. From the Physical Location form click on New and select the facility type from the list.



As with the Physical Location document the Facility consists of various tables and fields. Some fields are marked with red arrows indicating that you must enter data in these fields before you can save the form.

Facility Information

The Facility Information table captures information about the facility, including the name, assigned inspectors, and file active date. Some fields on this table are default fields and inherit their information from the Physical Location form.

New Create Save Done Cancel

Facility Information			
Name Bevtest Deli-Market & Gas Bar	Inspector Alan Garrett	Administrative Status Active	File Active Date 26-Mar-2016 16
Facility ID BHOFA8KKMZ	Hide From web <input type="radio"/> Yes <input checked="" type="radio"/> No	Facility Operation Hours Open <input type="text"/> Closed <input type="text"/>	
Legacy Number			
The Facility Is Open <input checked="" type="checkbox"/> All Year Round			

Facility Details

In the second table, details about the facility type will be entered. For the Food facility, this will include the type, additional facilities, whether it is part of a chain or franchise, among other details. **Be sure to include number of seats, rooms or spaces.**

Facility Details				
Type Restaurant	Risk Rating Risk 3	Chain Or Franchise <input type="checkbox"/>	Maximum Seating capacity 26	Smoking Status <input type="checkbox"/>
			Area (square feet)	

Operating Information (Permit/License Information)

The Operating Information table is used to capture the status of the permit, its fee status and if the facility is open all year or is seasonal.

The table defaults to the status of pending. **Change this to permitted unless the facility is still under construction.** Enter the Application date, and when the facility moves from the Status Pending to Permitted, enter the permitted date (usually the date the inspector has signed off on the facility). The issue and expiration dates will populate automatically after the Licensee has paid the full permit fee.

Operating Information		
Application Date 13-Jan-2011	Status Permitted	Date Permitted 13-Jan-2011 16
Issue Date	Expiration Date	
Permit Conditions		
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/>		
Expiry Date	Conditions	

Inspection Tables

The Table "Last Inspection" will display information as entered on the last inspection or will be blank for new facilities. This will auto-populate with the correct frequency once you have completed and saved this form.

Licensee/Owner Table

The Owner name defaults to the Licensee as entered on the Physical Location form. If the Licensee is different from that Licensee, choose New and follow the same process for creating a Licensee specific to this facility.

Licensee/Owner	
<input type="button" value="New"/> <input type="button" value="Choose Existing"/>	
*Choose from the existing Licensees/Owners first. If not listed create a new Licensee/Owner.	
Name Bevtest Hoffmann	ID BHOF-A8KK9N

Contact Information for Facility

The **Facility Location** address information tab defaults to that entered on the Physical Location.

Contact Information For Facility						
Facility Location	Mailing Address	Billing Address	Phone / Email	Additional Contacts		
Primary Contact Title		Primary Contact First		Primary Contact Last		
Building # 971	Direction [v]	Street Name Kruise		Type Way	Suffix [v]	Unit # [v]
Zip Code 97477		City Springfield		County Lane		State OR
Country U.S.A.		Directions [v]				

The **Mailing Address** tab has 2 auto selections and you will want to select Copy Business Address:

Contact Information For Facility				
Facility Location	Mailing Address	Billing Address	Phone / Email	Additional Contacts
<input type="button" value="Copy Physical Address"/>		<input type="button" value="Copy Business Address"/>		
Contact First [v]	Contact Last [v]			
Building # [v]	Direction [v]		Street Name [v]	
Zip Code [v]			City [v]	
Country [v]				

The **Billing Address** tab defaults to the Owner's address.

The **Phone /Email** tab needs to be completed information specific to the facility itself (it might be the same as the owner information but might be different).

Comments

Below the Contact information table, comments can be captured for the facility.

Comments

⌵

Creating a License and Applying Payment to a New Facility

The licensing billing process for a new facility is a manual process. Go to the Billing part of the form and add a Billing Type based on the seats/spaces/rooms entered in the Facility Details:

Facility Details			
Type Restaurant	Risk Rating Risk 3 - Full service restaurants. Extensive menu and handling of raw with cooking, cooling and reheating.	Chain Or Franchise	Maximum Seating capacity 72
			Area (square feet)

Operating Information			
Application Date 25-Mar-2019	Status Permitted	Date Permitted 25-Mar-2019	
Issue Date	Expiration Date		

Permit Conditions	
Add Edit Remove	
Expiry Date	Conditions

Last Inspection	
Date	# Violations

Supporting Facility Documents	

Billing	
Fee Details	
Payment History	
Invoice/Permit Details	

Billing	
Billing Type	Billing Address Owner Address

Select Keywords

Keywords

0-15 seats
16-50 seats
51-150 seats
151+ seats
Mobile-Exempt
Mobile-Needs Commissary
Mobile-Needs Warehouse
Commissary
Warehouse
Limited Service
Vending
Food B&B
Fee Exempt Food Service

OK Cancel

Now open all three twisties so you can see clearly what is happening:

Billing						
Create Annual Fee	Create Specific Fee	Create Random Fee	Create Renewal	Create Invoice	Post Payment	Regenerate Last Permit
Remove Fee	Adjusting Entry	Print Receipt	Remove Payment			
Fee Details						
Fee Type	Fee ID	Fee Date	By	Amount	Paid	
Payment History						
Payment ID	Payment Date	Posted By	Payment By	Payment Type	Check # / Details	
Invoice/Permit Details						

Use the Create Annual Fee button to set the License amount.

If needed, an invoice or renewal document can now be generated for the fee using the Create Invoice button on the Billing table. You can view the invoice by double clicking on it in this view:

Billing						
▼ Fee Details						
Fee Type	Fee ID	Fee Date	By	Amount	Paid	Balance F
Annual Permit~FF150	EVES-BALVHH	31-Dec-2019	Erica Van Ess	\$472.50	\$0.00	\$472.50
▼ Payment History						
Payment ID	Payment Date	Posted By	Payment By	Payment Type	Check # / Details	Payment Ai
▼ Invoice/Permit Details						
Invoice EVE37202000147 for Best Western Grand Manor Inn, 25-Mar-2019 for \$472.50						

When payment for the license fee comes in, use the Post payment button on the Billing table to apply payment and automatically generate a license:

Payment Information

Outstanding Fees

☒ EVES-BALVHH 31-Dec-2019 Annual Permit~FF150 \$472.50

Payment By

Date

16

Amount

ID

Payment Type

Check # / Details (30 character max)

OK






Cancel

The license can be opened and printed from this screen or it can be batch printed from the Billing>Ready to Print view.

This completes the process for single facility billing. The facility is set up for the next year's automated renewal fee and invoice creation. You will notice that the various billing documents created during this process now appear in the filing view as child docs of the facility form or can be viewed on the billing table on the facility form:

Oregon EHS Testing
(Local)

Main Menu

-  Filing
-  Calendar
-  Personal Calendar
-  Schedule
-  Log Time

New ▾						
	Common Name	Building # ^	Direction	Street Name ^	City ^	Cc
▶	Best Western Creswell Inn	345	E	Oregon Ave	Creswell	La
▶	Best Western Grand Manor	971		Kruse Way	Springfield	La
▼	Best Western Grand Manor Inn	971		Kruse Way	Springfield	La
▶	Food Facility: "Best Western Grand Manor", Amy Bleekman, Rehs, Restaurant - 16-50 Seats seats					
▼	Food Facility: "Best Western Grand Manor Inn", Erica Van Ess, Restaurant - 51-150 seats, Ap 25-Mar-2019, 72 seats					
	Permit # EVES-BALVDN for Best Western Grand Manor Inn, Expires 31-Dec-2019					
	Invoice EVE37202000147 for Best Western Grand Manor Inn, 25-Mar-2019 for \$472.50					

Other Billing Actions

Remove Payment button: If a payment was entered in error, or details were left off the payment, there is a button to remove the payment. If you do remove the payment you may be asked to enter a reason for the removal of the payment for reporting purposes.

Remove Fee button: If a fee was created in error, or is incorrect amount, a button is available on the billing table to remove the fee. If a payment has already been applied to a fee, the fee will be locked down. You will need to remove the payment first and can then remove the fee.

Adjusting Entries button: A payment entered incorrectly in the database does not need to be removed. An adjusting entry document can be created in the database to correct the payment, lessening or adding to the amount owing by the licensee. This is commonly used for NSF payments.

The system will treat an additional amount owing by the licensee as a fee and if the client owes a lesser amount than the fee indicates, the adjusting entry will be treated as a payment

Print Receipt Button: To issue a receipt for payment, click on the Print receipt button. You will be asked to choose which payments you wish to print on the receipt. The document then appears on screen where you can print it.

**Note: the receipt document is not a document that is saved to the system.*

Regenerate Permit Button: If a change is made to facility information and a new permit issued, or a permit needs to be re-printed for the Operator, make the necessary changes to the facility document and click on Re-generate permit. This will update the current year's permit allowing you to print with the most recent changes to the facility.

This should not be used if a facility is closed and opened under another owner. In this scenario follow the Change of Ownership procedures below.

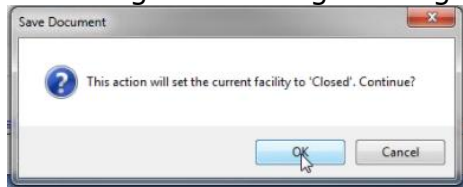
Change of Ownership

Office:

Double click to make the facility editable, then scroll down to Licensee/Owner and click on Change:

The screenshot shows a software interface with a toolbar at the top containing buttons: New, Create, Save, Done, Cancel, and Parent Document. Below the toolbar, there are expandable sections: Fee Details, Payment History, and Invoice/Permit Details. Under Invoice/Permit Details, there are fields for Billing Type (set to 16-50 Seats) and Billing Address (set to Owner Address). Below these is a section titled Facility Information Documents. At the bottom, there is a section titled Licensee/Owner with three buttons: Change, View, and Open In Business View. A red arrow points to the Change button.

You will get a message asking to close the facility, select OK:



A new form pops up with an active date of today's date, now is Pending (change to Permitted). It will auto-populate everything from the previous facility except for the owner.

If the facility name has changed, you will need to type in the new name:

Go to the Licensee/Owner section of the page and either make a New owner or Choose Existing to get the owner set up for the new facility. Fill in all Owner info and hit Done.

Make sure all information you have filled in for the new facility is correct and hit Done. You will see that the old one is closed with a red minus symbol and now there is a new facility (Erica's Gumbo Shack):

▶ Betty Rocker's	1699	W	11th	Eugene	Lane
▼ Bev's Gumbo Shack	38493		Mckenzie Hwy	Springfield	Lane
Food Facility: "Erica's Gumbo Shack", Amy Bleekman, Mobile-Class 4 - , Applied on 27-Mar-2017, Permitted, 0 seats					
▶ Food Facility: "Bev's Gumbo Shack", Amy Bleekman, Mobile-Class 4 - Mobile-Exempt, Applied on 1-Jan-2016, Out of Business on 2					

Lastly, change the name of the parent document to reflect any name/address changes:

▼ Erica's Gumbo Shack	38493	Mckenzie Hwy	Springfield	Lane
Food Facility: "Erica's Gumbo Shack", Amy Bleekman, Mobile-Class 4 - , Applied on 27-Mar-2017, Permitted, 0 seats				
▶ Food Facility: "Bev's Gumbo Shack", Amy Bleekman, Mobile-Class 4 - Mobile-Exempt, Applied on 1-Jan-2016, Out of Bu				

Field – Instructions for inspectors who find a change of ownership (optional):

If a facility is closing or changing owner, administration staff will manage the changing of the fields that need to be changed.

As an Inspector, if it is a change of owner, or name change, continue to create the inspection under the existing facility. Then alert the clerical staff of the changes.

Here is the process:

1. On the facility document, click on Create at the top of the form and choose Note to File.
2. Indicate with the note to file type field that this is a facility name change or owner change.
3. Conduct inspection as normal under the old facility name/owner and let the operator know you will email them an updated report once the new ownership information is entered into the database.
4. If a facility has closed, there is no need to create an inspection for this facility and you can just notify office staff of the closure.

Other Tasks Associated with a Facility

Closing a facility (Admin Function)

When a facility closes, two fields will be changed on the form. The Administrative Status on the **Facility Information** table should be moved to "Closed", and in the **Operating Information** table, the status should be changed to "Out of Business". Each of these fields have dates that correspond to them.

Updating Licensee Information (Admin Function)

Double click on the current owner name and choose View or Open in Business View and enter the correct information.

Create and New Buttons

From the "Create" button, Correspondence, Notes to file, and Complaints can be created.

Correspondence

Letter templates (called print forms) can be set up in the database by a program administrator. Once the templates have been created, you will be able to choose to generate these letters from the facility document and have the system pull the values from the facility on to these forms.

Examples of correspondence are: Second Renewal Notices, Order of Closure, Dismissal of Closure, Temporary Restaurant Handout, Significant Rule Change handouts, etc.

Note to file

A Note to File is a document that can serve as a memo or "sticky note" in the system to serve as a reminder of a communication or action for that facility. It will appear as a child document underneath the related facility.

Note to file should be used when a facility changes fee code or to document any other changes that it would be important for an inspector or office staff to be able to see easily without having to open up the facility.

Complaint

Complaints will be discussed in more detail under the Complaints Module section. Always use the Create>Complaint option to enter a complaint (not the New>Foodborne Illness option).

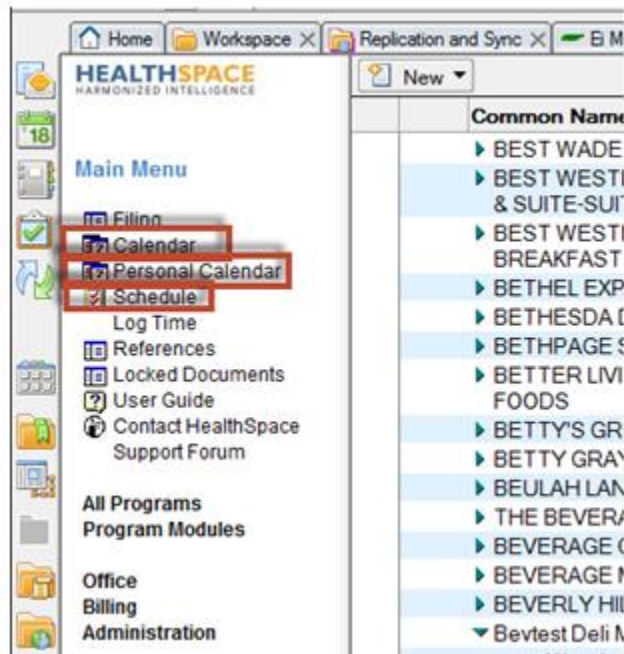
New Inspection and Plan Review

From the "New" button on a facility, various document types can be created. "New Inspections" are created for all facility types. And Plan Review is included for food service facilities. ***Do not use the New>Foodborne Illness Complaint function, the Create>Complaint should be used instead.***

Inspection Schedules

Finding Scheduled Inspections

1. Click on Main Menu from any view
2. In this menu, look for the Calendar link. This will display the scheduled inspections for all inspectors in your county.
3. If you are in the system as an inspector, click on Personal Calendar to view the inspections that are assigned to you. Double click on one of the entries in the calendar. This will take you to the facility document where you can choose "New" and "Inspection".



There are a variety of ways for the inspector to view their upcoming or overdue inspections.

Routine Inspection dates are set in the system with the use of scheduling tools that the program administrator sets up. A Routine inspection will be scheduled based on the facility type for each facility. These dates are called Prescribed Inspection dates and display on the facility form in the Inspections table.

Follow up inspection dates are automatically scheduled by the inspector from another Inspection based on the inspection result. This date is displayed on the facility as Re-inspection or Follow-up date.

All Calendars and Personal Calendars

From the All Programs menu, the Calendar and Personal calendar are views that display like calendars.

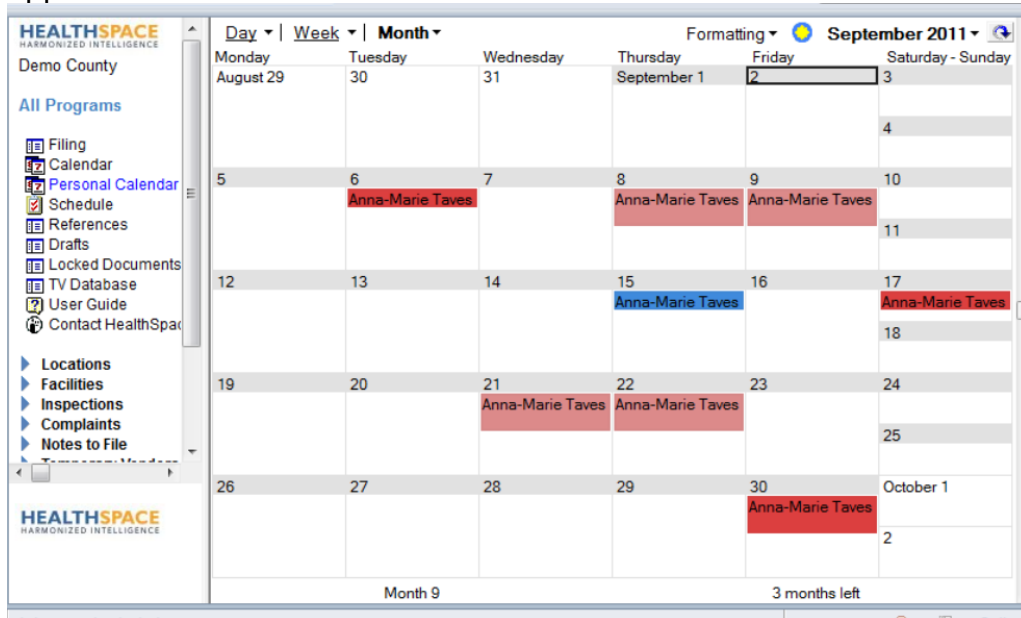
The Calendar

In the Calendar, all scheduled Routine inspections and, follow-up inspections for all Inspectors are displayed on the date due.

Double click the entry in the view to open the facility and choose to begin a Routine Inspection. Or if it is a follow-up that is due, double click the entry to open the originating inspection and click on the New Follow-up button.

The Personal Calendar

The Personal Calendar has the same behavior as the Calendar, however the only inspections that will be displayed are for the inspector who is logged into the application with their ID file.



Example of a Personal Calendar View

The Schedule View

The schedule view, found just below the calendars, displays the same inspection due information but in a list format. The view also provides additional information about the facility, such as address and date of last inspection.

Replication and Sync
Workspace
E Manager
Wallowa EHS Live - Inspections...

Wallowa EHS Live
(Local)

Main Menu

- Filing
- Calendar
- Personal Calendar
- Schedule
- Log Time
- References
- Locked Documents
- Contact HealthSpace
- Support Forum

All Programs

- Env. Health
- Disease
- Office
- Billing

Facility Name	All Year Round	Address	City ^	County ^	Phone Number	EHS ^
2017						
2018						
2019						
Jan						
Inspector Assignment						
Feb						
Apr						
Inspector Assignment						
Campground						
Wallowa River Rv Park	Yes	503 Whiskey Creek Rd	Wallowa	Wallowa	(541) 886-7002	Inspector Assignment
Wallowa Lions Park	Yes	501 Truck Rte	Wallowa	Wallowa	(541) 398-0844	Inspector Assignment
Wallowa Valley Stay N Wash	Yes	402 W 7th	Wallowa	Wallowa	(541) 886-6944	Inspector Assignment
Park At The River	Yes	5988 Wallowa Lake Hwy	Joseph	Wallowa	(541) 432-8800	Inspector Assignment
Scenic Meadows Rv Park	Yes	59781 Wallowa Lake Hwy	Joseph	Wallowa	(541) 432-9285	Inspector Assignment
Five Peaks Rv Park	Yes	508 N Mill St	Joseph	Wallowa	(541) 398-1925	Inspector Assignment
Wallowa Falls Campground	Yes	End Of Wallowa Lk Hwy	Joseph	Wallowa	(503) 813-6954	Inspector Assignment
Food Facility						
Pool Facility						
School Facility						

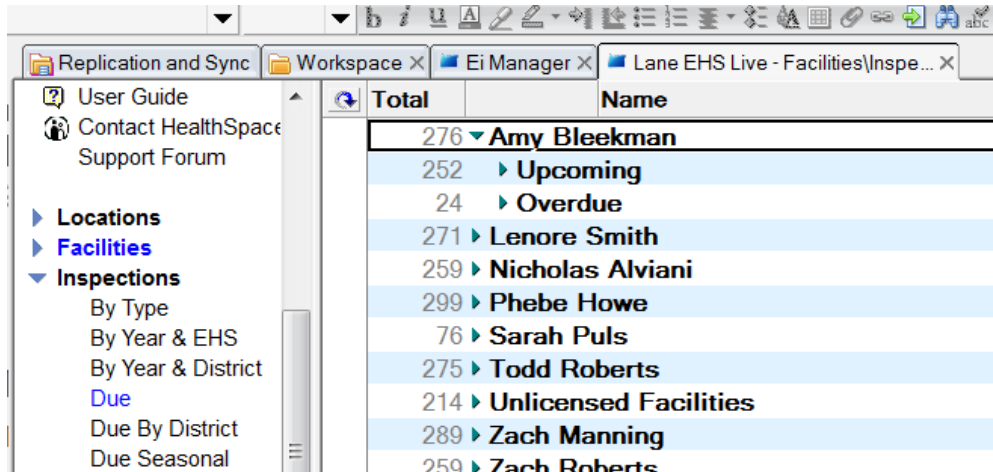
Additional Scheduling Views

You can print schedules from Main Menu>All Programs>Inspections>Due. For a printed schedule, you can open all the inspections, place a check

Printing an Inspection Schedule List

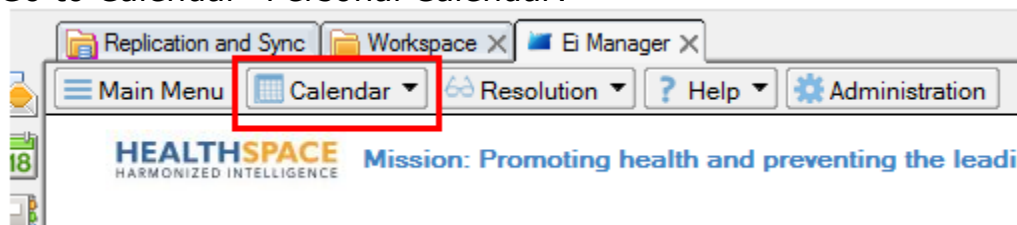
Exporting and Printing a Schedule:

1. Go to your Ei Manager tab and select Classic Menu from the options at the top
2. Then go to Inspections>Due and open the twistie by your name.
3. Open the twistie for Upcoming or Overdue (or both depending on your needs)
4. Use the plus sign in the top tool bar to open your entire facility list
5. Select the child docs individually by putting a check mark out to the left of each facility, then use the menu item Actions>Export>View to Microsoft Excel.



-OR-

Go to Calendar>Personal Calendar:



Then go to Formatting and select Summarize:



Then go to File>Print>Calendar List and select a date range:

Print Calendar

Printer Page Setup Calendar Style

Printer

Name: \\wpdhsprt103.dhs.sdc.pvt\PSOB2-NS2-IP53 Settings...

Status: Ready
Type: HP Universal Printing PCL 5 (on PSOB2-NS2-PS53.hr.state.or.us)
Comment: Floor 6 / Suite 608
Location:

What to Print

☐ Notes Basic Calendar Views
☐ Each frame individually
☐ Selected frame only
☒ Print calendar
☐ Print calendar to a document
☐ Selected documents

Calendar style: Calendar List

Print Range

From: 01/01/2018 16 to: 06/30/2018 16

Print Quality

☐ Print as draft
☐ Scale all graphics to 100%
☒ Preview in color

Copies

Number of copies: 1
☒ Collate copies

OK Preview... Cancel

You may want to go back in time a month or two to ensure that you haven't missed any inspections/reinspections.

The Complaints Module

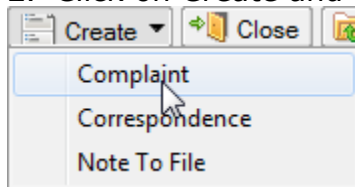
Accessing Complaint Forms

There are 3 types of complaints:

- Those associated with a Facility
- Those associated with only an address or location not a Facility or Physical Location document.
- Those associated with a Physical location.

Starting a Complaint Associated with a Facility

1. Open the Facility document.
2. Click on Create and then click on Complaint.



The complaint form opens. The Facility Information table captures information about the facility where the complaint incident occurred.

Facility Information						
Name Bevest Deli Market & Gas Bar		Location Type ComplaintCategory 2		Telephone number (615)		
Health Office Tennessee Department of Agriculture		Grand Division Middle				
Primary Contact Title Owner/Manager		Primary Contact First Bevest		Primary Contact Last Hoffmann		
Building # 11238	Direction	Street Name Kingston	Type Pkwy	Suffix W	Unit #	
Zip Code 37934		City KNOXVILLE	County Knox	State TN		
Country USA	Directions					

3. Next enter the details of the complaint into the **General Details** table. The complaint type Date received, who received the complaint, and to whom it is being referred.

General Details		<input type="checkbox"/> Critical
Complaint Type [Dropdown]	Date Received 07-Apr-2016 12:54 PM	
Investigation Start Date [Date Picker]	Date Closed [Date Picker]	
Received By [Dropdown]	Referred To [Dropdown]	
Confirmation No	Census Tract [Dropdown]	
Complaint ID BHOF-A8SRCF		

4. If **Complainant Information** is provided, such as name and contact information, enter it into that table.

Complainant Information		<input type="checkbox"/> Verified
Name [Text Box]	Phone # (615)	
Address [Text Box]	Email [Text Box]	

- Complaint Details must be entered by the person who starts the complaint form into the **Complainant Details and Actions** table.

Complainant Details and Actions	
Complaint Details	
Action Taken	Follow-Up Date
	16
	Action Required By
	16
Comments	
Attachments	

- The form can now be saved.

The form at this point would show as pending in the view. (Information gathered, but no action on the complaint at this time.) **There is a red icon ball in front of the Facility as well as an alert to staff to a pending or active complaint:**

Warehousing & manufacturing: Bevest Deli Market & Gas Bar, Alan Garrett, Bakery, Applied on 1-Apr-2016, Pending
Food Facility: "Bevest Deli Market & Gas Bar", Alan Garrett, Category 2 -, Applied on 6-Apr-2016, Pending
Complaint: Foodborne Illness: Received on 1-Apr-2016 - Pending

- To start the investigation, go to the Facility Document; the Complaints view in the All Programs menu or the Welcome screen and open the complaint document.

When the person to whom the complaint was referred enters an investigation start date, the form moves to an active complaint status. The inspector can enter details and action taken in the available fields. If follow-up is required, a date can be entered, and the complaint form will show in the personal calendar embedded in the program.

Time tracking can be entered on the form, and any images or attachments can be added to the form.

- Once a complaint has been completed, enter a value in the Date closed field. This will remove the red icon from the facility and will show as closed in the views.

Starting a Complaint NOT Associated with a Facility or Physical Location

The Complaint form can be accessed from the Welcome screen by clicking on the Complaints icon.



This opens the complaints view, where a new complaint can be created from the top of the view, and active complaints can be accessed and tracked.

1. To start a new complaint not associated with a Facility or Physical Location, click on New Complaint:

2. When the complaint form opens, the first table, **Facility Information**, captures information about the address where the complaint incident occurred. A facility name will not be entered (If the facility is known, use the facility document to start the complaint).

3. Next enter the details of the complaint into the **General Details** table. The complaint type Date received, who received the complaint, and to whom it is being referred.

4. If **Complainant Information** is provided, such as name and contact information, enter it into that table.

- Complaint Details must be entered by the person who starts the complaint form into the **Complainant Details and Actions** table.

Complainant Details and Actions	
Complaint Details	
Action Taken	Follow-Up Date
	16
	Action Required By
	16
Comments	
Attachments	

- The form can now be saved.

The form at this point would show as pending in the complaints view (Information gathered, but no action on the complaint at this time.)

This type of complaint can only be accessed through the complaints button or views.

- To start the investigation, go to the Complaints view in the All Programs menu or the Welcome screen and open the complaint document.

When the person to whom the complaint was referred enters an investigation start date, the form moves to an active complaint status. The inspector can enter details and action taken in the available fields. If follow-up is required, a date can be entered, and the complaint form will show in the personal calendar embedded in the program.

Time tracking can be entered on the form, and any images or attachments can be added to the form.

In the complaints view any complaint not associated with a facility will have an icon with a question mark in it to indicate there is no facility. Click on the complaint to open it and assign a facility.

New Complaint

</

- Once a complaint has been completed, enter a value in the Date closed field. This will remove the red icon from the facility if applicable and will show as closed in the views.

Starting a Complaint Associated with a Facility

1. Open the Physical Location document twistie so you can see the child/facility document. Double click to open the facility document.
2. Click on Create and then click on Complaint.

- Complaint
- Correspondence
- Note To File
- Sample

When the complaint form opens, the first table, **Facility Information**, captures information about the Physical Location where the complaint incident occurred. The Physical Location name has been transferred to the form. (If the facility is known, use the facility document to start the complaint).

Facility Information					
Name Park At The River		Location Type ComplaintRecreational Park		Telephone number (541)432-8800	
Health Office Oregon Health Authority		County Wallowa		Outbreak ID #	
Primary Contact Title		Primary Contact First		Primary Contact Last	
Building # 5988	Direction	Street Name Wallowa Lake	Type Hwy	Suffix	Unit #
Zip Code 97846		City Joseph	County Wallowa		State OR
Country U.S.A.		Directions			

General Details		<input type="checkbox"/> Critical
Complaint Type [Red Flag]	Date Received 25-Mar-2019 03:28 PM	
Investigation Start Date	Date Closed	
Received By Erica Van Ess	Referred To	
Confirmation No	Census Tract	

Complainant Information		<input type="checkbox"/> Asked to remain anonymous	<input type="checkbox"/> Verified
Name	Phone #1 (541)		Phone #2 (541)
Address	Email		Results Requested No Yes
City	State OR		Zip Code
Country USA			

3. Next enter the details of the complaint into the **General Details** table. The complaint type Date received, who received the complaint, and to whom is it being referred.

General Details		<input type="checkbox"/> Critical
Complaint Type Possible Foodborne Illness [Red Flag]	Date Received 25-Mar-2019 03:28 PM	
Investigation Start Date	Date Closed	
Received By Erica Van Ess	Referred To	
Confirmation No	Census Tract	

If **Complainant Information** is provided, such as name and contact information, enter it into that table.

Complainant Information		<input type="checkbox"/> Asked to remain anonymous	<input type="checkbox"/> Verified
Name <input type="text"/>	Phone #1 <input type="text" value="(541)"/>	Phone #2 <input type="text" value="(541)"/>	
Address <input type="text"/>	Email <input type="text"/>	Results Requested <input type="radio"/> No <input type="radio"/> Yes	
City <input type="text"/>	State <input type="text" value="OR"/>	Zip Code <input type="text"/>	
Country <input type="text" value="USA"/>			

- Complaint Details must be entered by the person who starts the complaint form into the **Complainant Details and Actions** table.

Complaint Details and Actions	
Complaint Details <input type="text" value=""/>	
Action Taken <input type="text" value=""/>	Follow-Up Date <input type="text" value="16"/>
Disposition <input type="text" value=""/>	Action Required By <input type="text" value="16"/>
Comments <input type="text"/>	
Attachments <input type="text"/>	

- The form can now be saved.
The form at this point would show as pending in the complaints view. (Information gathered, but no action on the complaint at this time.) There is a red icon ball in front of the Facility view.
- To start the investigation, go to the Complaints view in the All Programs menu or the Welcome screen and open the complaint document.

When the person to whom the complaint was referred enters an investigation start date, the form moves to an active complaint status. The inspector can enter details and action taken in the available fields. If follow-up is required, a date can be entered, and the complaint form will show in the personal calendar embedded in the program.

Time tracking can be entered on the form, and any images or attachments can be added to the form.

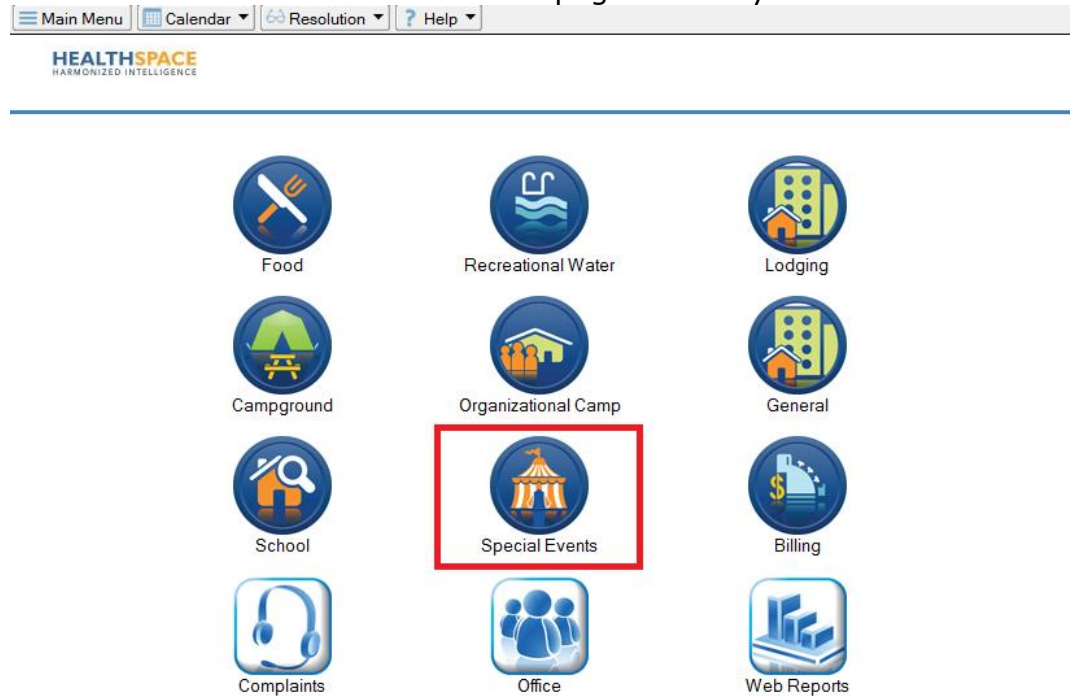
- Once a complaint has been completed, enter a value in the Date closed field. This will remove the red icon from the facility if applicable and will show as closed in the views.

Special Events/Temporary Restaurant Module

Accessing Special Events/Temporary Restaurants

Temporary Vendor Facilities can be set up, permitted and inspected in HealthSpace through the Special Events module.

Click on the icon found on the Welcome page to take you to this module.



Special Events

The Special Events module has its own set of views for both the events and vendors that participate in the events. It is a module that is separate from the Main Menu and your other licensed facilities.

Temporary Food Vendors can be associated with a Special Event.

Begin by clicking on New Event from the Special Events view to open an Event document.

Name ^	Start Date ^	End Date ^	Inspector
▼ 2017			
Annual Salmon Roast	27-May-2017	27-May-2017	OR Tes
Irish Festival	04-Aug-2017	06-Aug-2017	OR Tes
Memorial Golf Tournament	29-May-2017	04-Jun-2017	OR Tes
State Fair	19-Apr-2017	20-May-2017	Erica V
Winter Market	03-Dec-2017	30-Jan-2018	Anna-M
▼ 2016			
Caledonian Days	08-Jul-2016	10-Jul-2016	David I
Funfest	08-Jul-2016	10-Jul-2016	Valerie
Saturday Market	01-Apr-2016	31-Dec-2016	Brad W
The Franklin County Fair	16-Jul-2016	23-Jul-2016	Nichol

Enter the Event Name, Event start and End dates, Address of event and other mandatory fields.

Event Details

Event Name: [Field] Event Id: AMTS-AMTS32

Start Date: [Field] End Date: [Field]

Health Office: REHS Anna-Marie Taves [Field]

Region: [Field] Expected # Of Vendors: [Field]

Comments: [Field]

Temporary Facilities

Add Facility Remove Facility

Sponsor Information

Copy Existing Sponsor

Name: [Field] Mailing Address: [Field]

Phone #: [Field] Comments: [Field]

Contact Information

Copy Existing Contact

Coordinator: [Field] Mailing Address: [Field]

Phone #: [Field] Cell #: [Field]

Email Address: [Field] Comments: [Field]

Site Address

Building #: [Field] Direction: [Field] Street Name: [Field] Type: [Field] Suffix: [Field] Unit #: [Field]

Zip Code: [Field] City: [Field] County: [Field] State: [Field]

Country: U.S.A. [Field] Directions: [Field]

Other information can also be added, such as Sponsor and Contact information for the event. This information can be re-used with the copy buttons if the information has been previously entered on other Events.

Temporary Vendors can be added to the event if a Vendor has already been added to the database (if they haven't been created yet, skip down to Temporary Vendors below).

Also, enter the operation day/times under Permit Conditions so those will show on the permit.

Licensed restaurants will still need to be entered as a vendor, since they will have a separate license issued while acting as a temporary restaurant.

The screenshot shows a software interface for entering vendor facility information. It includes sections for Facility Information, Operating Information, and Permit Conditions. The 'Permit Conditions' section is highlighted with a red box, showing 'Expiry Date: no expiry' and 'Conditions: Saturday 9am-6pm'.

Facility Information		
Name	REHS	Administrative Status
Erica's Hot Dogs	Erica Van Ess	Active
Type of Facility	Chain or Franchise	Facility Description
For Profit Temporary Restaurant		
File Active Date	Facility ID	Health Office
25-Jul-2017	EVES-APLMFF	Oregon Health Authority
Region		FTID

Operating Information	
Application Date	
01-Aug-2017	16

Permit Conditions	
Expiry Date	Conditions
- no expiry -	Saturday 9am-6pm

Events				
Event Name	Event ID	Start Date	End Date	Officer
2016				
Funfest	TPHN-ABMVPX	08-Jul-2016	10-Jul-2016	Valerie Aliski

Connecting the Vendor to the Special Event can be done from the Vendor document as well as from the Event document.

Once the mandatory fields are entered on the Vendor facility, choose the event that this vendor will be attending. A list of events will come up on the screen, select the event and click on "OK".

The screenshot shows a 'Special Events' dialog box. The 'Add' button is highlighted with a red box. The 'State Fair' event is selected with a checkmark. The 'OK' button is also highlighted with a red box.

Special Events			
Select Events To Add:			
Name ^	Start Date	End Date	
2017			
Annual Salmon Roast	27-May-2017	27-May-2017	
Irish Festival	04-Aug-2017	06-Aug-2017	
Memorial Golf Tournament	29-May-2017	04-Jun-2017	
<input checked="" type="checkbox"/> State Fair	19-Apr-2017	20-May-2017	
Winter Market	03-Dec-2017	30-Jan-2018	
2016			

This facility will now show in the Special Event window.

Permitting the Temporary Vendor

The Temporary Vendor facility must have all mandatory fields filled in, the Billing type filled in, and have an owner associated with it. Once this information has been added to the form, the permitting is done from the billing table.

The screenshot shows a software interface for creating a permit. The 'Billing' section at the bottom is highlighted with a red rectangle. It contains several buttons: 'Create Specific Fee', 'Create Random Fee', 'Create Invoice', 'Post Payment', 'Regenerate Selected Permit', 'Issue Temporary Permit', 'Remove Fee', 'Adjusting Entry', 'Print Receipt', 'Remove Payment', and 'Third Party Invoice'. Below these buttons are expandable sections for 'Fee Details', 'Payment History', and 'Invoice/Permit Details'. The 'Invoice/Permit Details' section shows 'Billing Type' as 'Tent/Canopy' and 'Billing Address' as 'Facility Location'.

Unlike the other modules, **Fees and payments for Temporary Vendors permits are set up manually**, done by clicking one button on the Billing Table "Issue Temporary Permit":

This is a close-up of the 'Billing' section from the previous screenshot. The 'Issue Temporary Permit' button is highlighted with a red rectangle. The other buttons and expandable sections are also visible.

Choose the event that this permit is for, by clicking on the event, and clicking on OK.

The 'Special Events' dialog box is shown, prompting the user to 'Select the corresponding event for this permit.' It contains a table with the following data:

Event Name	Event ID	Start Date	End Date	Officer
2017				
Summer Fair	AMTS-AN2M9L	10-Jul-2017	20-Jul-2017	Anna-Marie
2012				
Chili Cook Off	AMTS-92XV97	14-Dec-2012	15-Dec-2012	Anna-Marie
2011				
Colonial Company Picnic	BCOE-85ENGJ	17-Sep-2011	19-Sep-2011	Anna-Marie

Buttons for 'OK' and 'Cancel' are on the right side of the dialog.

The Start and End Dates, as set up on the Event default to the Start and End Dates for the Temporary Vendor Permit. They are editable if those dates need to be edited.

Enter the Fee amount into the Amount Field, enter a Fee Code if this is a value that needs to be tracked. **OHA recommends using Single Event, Seasonal and Intermittent here for consistency.**

Enter the Payment Type, Payment Date and the Check details if applicable.

Permit Information

Start Date 10-Jul-2017	End Date 20-Jul-2017	Amount
Fee Code	Payment Type	Payment Date
ID AMTS-AN2MPP		
Check # / Details (30 character max)		

OK Cancel

Click on OK once this data is correctly entered.

This action will Create the fee, Post the payment and generate the Temporary Vendor Permit by bringing it up on the screen to be printed. It can also be printed from the Vendor views:

Billing

Create Specific Fee Create Random Fee Create Invoice Post Payment Regenerate Selected Permit Issue Temporary Permit
Remove Fee Adjusting Entry Print Receipt Remove Payment Third Party Invoice

▼ **Fee Details**

Fee Type	Fee ID	Fee Date	By	Amount	Paid	Balance	Payment History
Temporary Permit (Event AMTS -AN2M9L)	AMTS-AN2MPP	20-Jul-2017	Anna-Marie Taves	\$75.99	\$75.99	\$0.00	AMTS-AN2MPP \$75.99

▼ **Payment History**

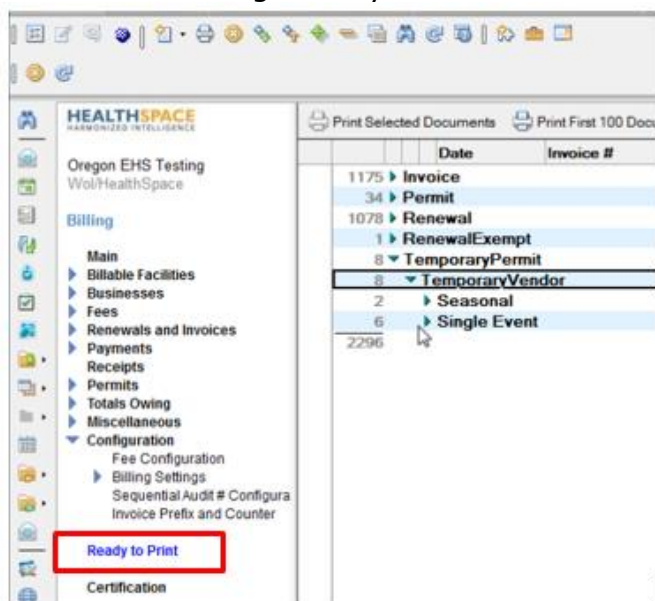
Payment ID	Payment Date	Posted By	Payment Type	Check # / Details	Payment Amount
AMTS-AN2MPP	14-Jun-2017	Anna-Marie Taves	Check	1234	\$75.99

▼ **Invoice/Permit Details**

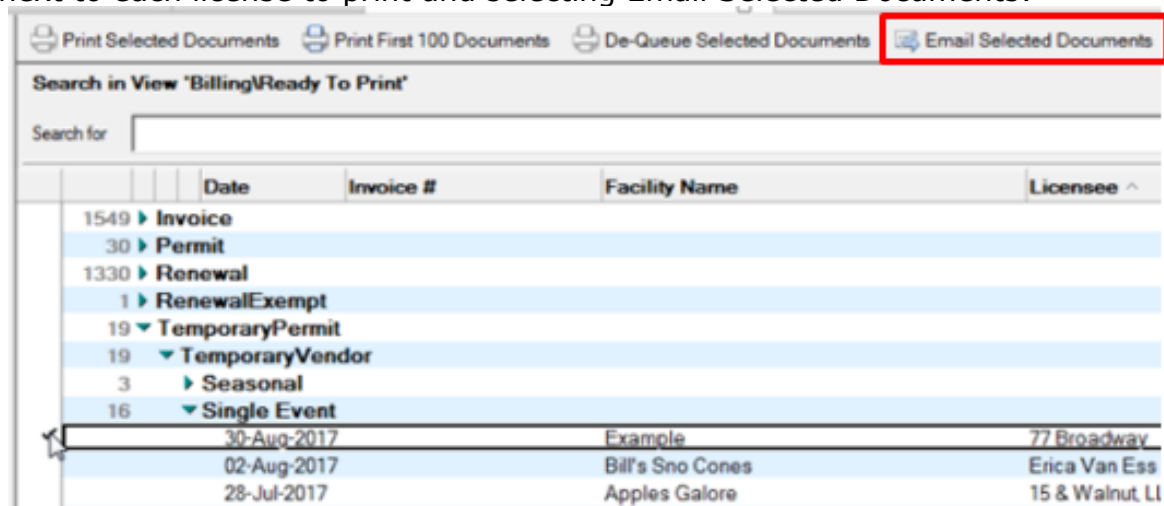
Temporary Permit # AMTS-AN2MU3 for Panani Express, Event: Summer Fair (AMTS-AN2M9L), Expires 20-Jul-2017

Billing Type: Tent/Canopy Billing Address: Facility Location

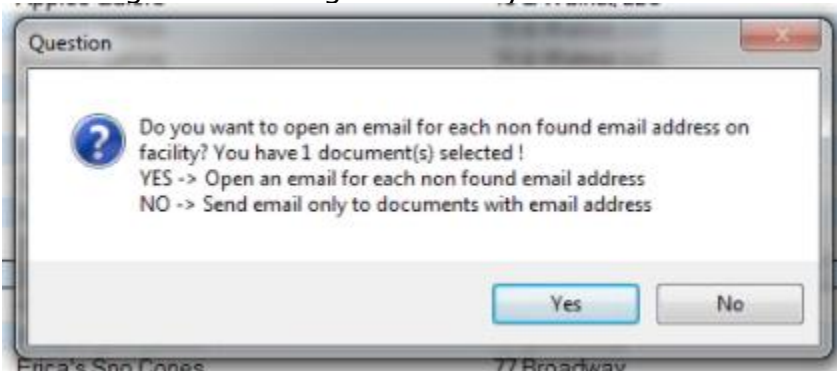
Or from the Billing>Ready to Print view:



You have the ability to email your permits from this view as well by putting a check next to each license to print and selecting Email Selected Documents:



You will get an message if a facility's email is invalid:



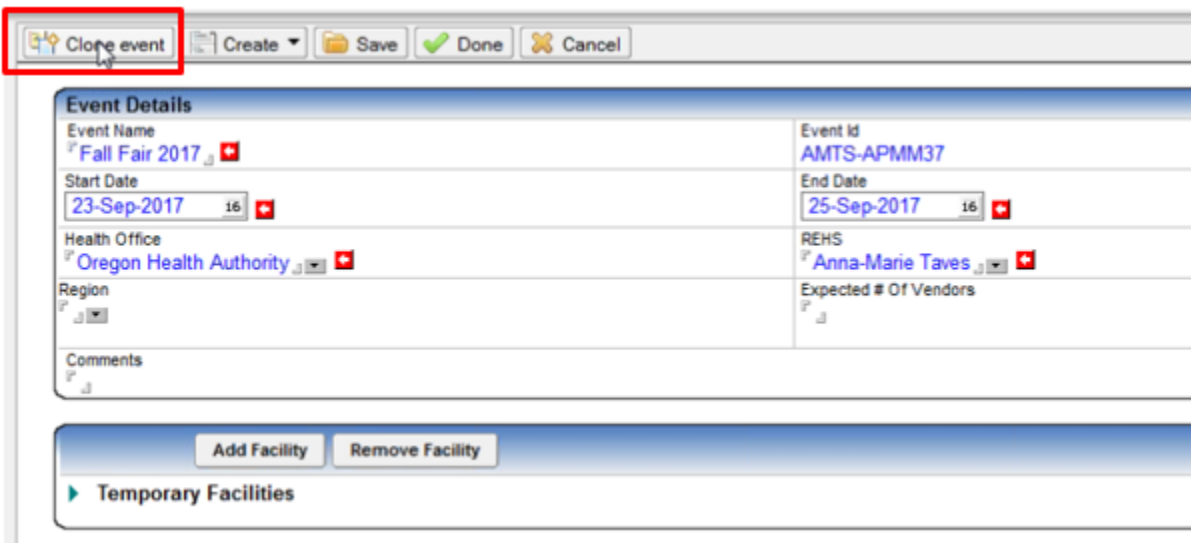
You can say 'No', and those with invalid emails will not clear from the view, so you can easily see which will need to be printed or have their email addresses updated before you can email their permit.

For temporary restaurants that will be inspected in the field, the licenses can be printed in advance for the inspector to take to the event and hand out after conducting their field inspection or they can be printed in the field by the inspector at the end of the inspection.

Cloning an Event

If you have an event that happens every year, you will need to create it each year so there is a separate record in your database for reporting and tracking. But there is an easy way to copy the information from the previous year.


Click Clone Event and then rename with this year's date, ex: Fall Fair 2018



The screenshot shows a software interface with a toolbar at the top. The 'Clone event' button, which has a document icon, is highlighted with a red rectangle. Other buttons in the toolbar include 'Create', 'Save', 'Done', and 'Cancel'. Below the toolbar is a form titled 'Event Details'. The form contains several fields: 'Event Name' (Fall Fair 2017), 'Start Date' (23-Sep-2017), 'End Date' (25-Sep-2017), 'Health Office' (Oregon Health Authority), 'Region' (a dropdown menu), 'Comments' (a text area), 'Event Id' (AMTS-APMM37), 'End Date' (25-Sep-2017), 'REHS' (Anna-Marie Taves), and 'Expected # Of Vendors' (a text area). At the bottom of the form are two buttons: 'Add Facility' and 'Remove Facility'. Below these buttons is a section titled 'Temporary Facilities'.

Enter the start and end dates for the event, follow the prompts asking about the location and it will set up the new event.

It will bring forward all vendors that attended the previous year. If any are not attending, you can click Remove Facility and select the facility. Or you can Add vendors using the Add Facility button:



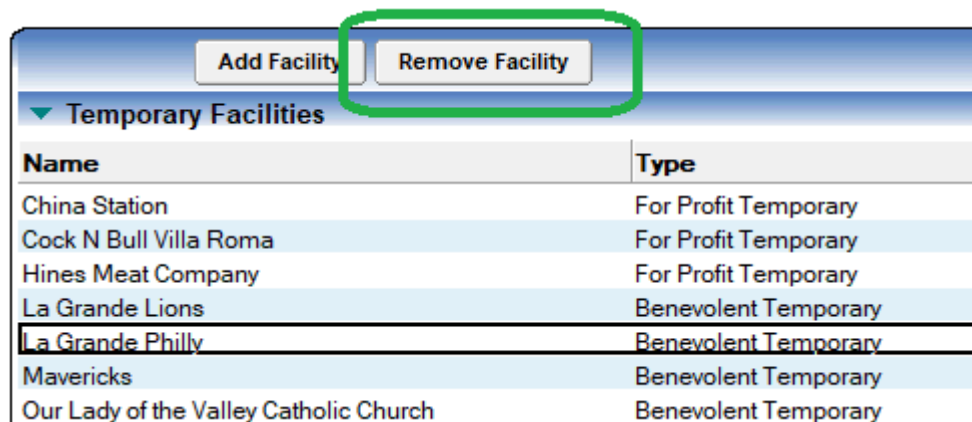
The screenshot shows a table titled 'Temporary Facilities' with three columns: 'Name', 'Type', and 'Licensee'. The table contains two rows of data. The first row is 'Last Minute Donuts' with the type 'Benevolent Temporary Restaurant' and the licensee '(Owner Not Found)'. The second row is 'That one place' with the type 'For Profit Temporary Restaurant' and the licensee '(Owner Not Found)'. Above the table are two buttons: 'Add Facility' and 'Remove Facility'.

Name	Type	Licensee
Last Minute Donuts	Benevolent Temporary Restaurant	(Owner Not Found)
That one place	For Profit Temporary Restaurant	(Owner Not Found)

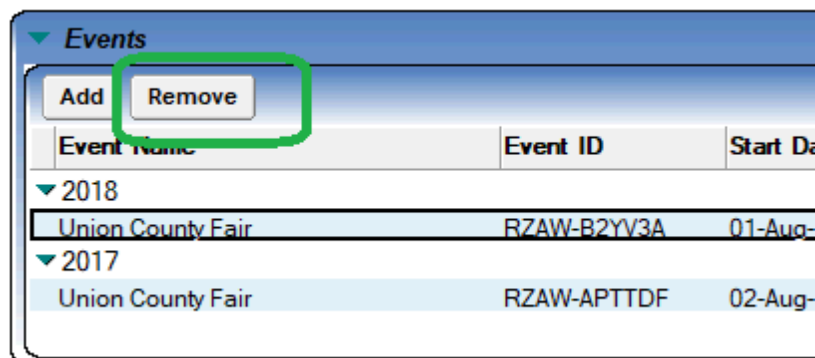
Removing/Dissociating an Event and Vendor

While the vendor facility and the temporary event have links to each other they are locked, and neither can be deleted.

Open either the facility or the event and use the Remove button to clear these links. A facility must be in no events to be deleted; and an event must have no facilities in it before the event can be deleted.



Temporary Facilities	
Name	Type
China Station	For Profit Temporary
Cock N Bull Villa Roma	For Profit Temporary
Hines Meat Company	For Profit Temporary
La Grande Lions	Benevolent Temporary
La Grande Philly	Benevolent Temporary
Mavericks	Benevolent Temporary
Our Lady of the Valley Catholic Church	Benevolent Temporary



Events		
Event Name	Event ID	Start Date
2018		
Union County Fair	RZAW-B2YV3A	01-Aug-
2017		
Union County Fair	RZAW-APTDF	02-Aug-

The inspections and/or permits must also be deleted before the facility can be deleted:

► Gardenias Tamales	Ryan Zastrow	For
► Hines Meat Company	Ryan Zastrow	For
► Just a Little Something Different	Ryan Zastrow	For
▼ La Grande Lions	Ryan Zastrow	Bei
→ Inspection Temporary Restaurant on 2-Aug-2017, by Ryan Zastrow		
▼ La Grande Philly	Ryan Zastrow	Bei
→ Inspection Complaint on 4-Aug-2017, by Ryan Zastrow		
→ Inspection Temporary Restaurant on 2-Aug-2017, by Ryan Zastrow		
Ladd Creek Farms	Ryan Zastrow	For
Mavericks	Ryan Zastrow	Bei
► Merlins Catering	Ryan Zastrow	For

Operational Review

There is not a function in HealthSpace to conduct the operational review for a seasonal/intermittent facility, but those documents can be scanned as a PDF and attached to the Temporary Vendor facility in the Comments section for the facility.

Billing Configuration

Do not make any changes to any configurations settings other than those outlined here

Billing Settings

These settings are in Main Menu>Billing>Configuration>Billing Settings

Several fields in the billing settings document establish parameters for the generation of annual licenses. This includes the manual licensing of new facilities and the auto generating the fees and renewal notices for yearly licenses and more.

Configuration Details	
Financial Year End Dec 31 2020 16	Permit Renewal Number of Days (Prior to permit expiration date) 60
Permit Renewal Health Unit Remittance Information <input type="radio"/> Use Physical Location <input checked="" type="radio"/> Use Billing Settings	Invoice Health Unit Remittance Information <input type="radio"/> Use Physical Location <input checked="" type="radio"/> Use Billing Settings
Renewal Remittance Office Oregon Health Authority	Invoice Remittance Office Oregon Health Authority
Use Multiple Facility Renewal (displays the option to create combined facility renewals at the owner level) <input type="radio"/> Yes <input checked="" type="radio"/> No	
Facility Billing Address Default Owner Address	
Payment Information Health Office <input type="radio"/> Use Physical Location <input checked="" type="radio"/> Use Billing Settings	Owner Billing No
Payment Information Health Office Default (Post Payment) Oregon Health Authority	
Random Fee Types Annual Permit Hourly Charge	Payment Types Check Cash Credit

**Note: In the HealthSpace applications, it is the expiry date of the licenses that drive the annual renewal run, not the Start date.*

The Financial year end date field will need to be manually advanced to the end date of the upcoming fiscal year of the program area due for renewal.

As an example: When facilities are expiring at the end of December 2019, and it is time to run the renewal applications, advance the end date to December 31, 2020:

Save Done Cancel

Configuration Details	
Financial Year End Dec 31 2020 16	Permit Renewal Number of Days (Prior to permit expiration date) 60

The Field Permit Renewal Number of Days is an editable field used to determine how far in advance of the current permit end date the fees and invoices should be run during an automated billing run. In our example, the Fees and Renewal notices will be auto generated 60 days in advance; around the 2nd of November.

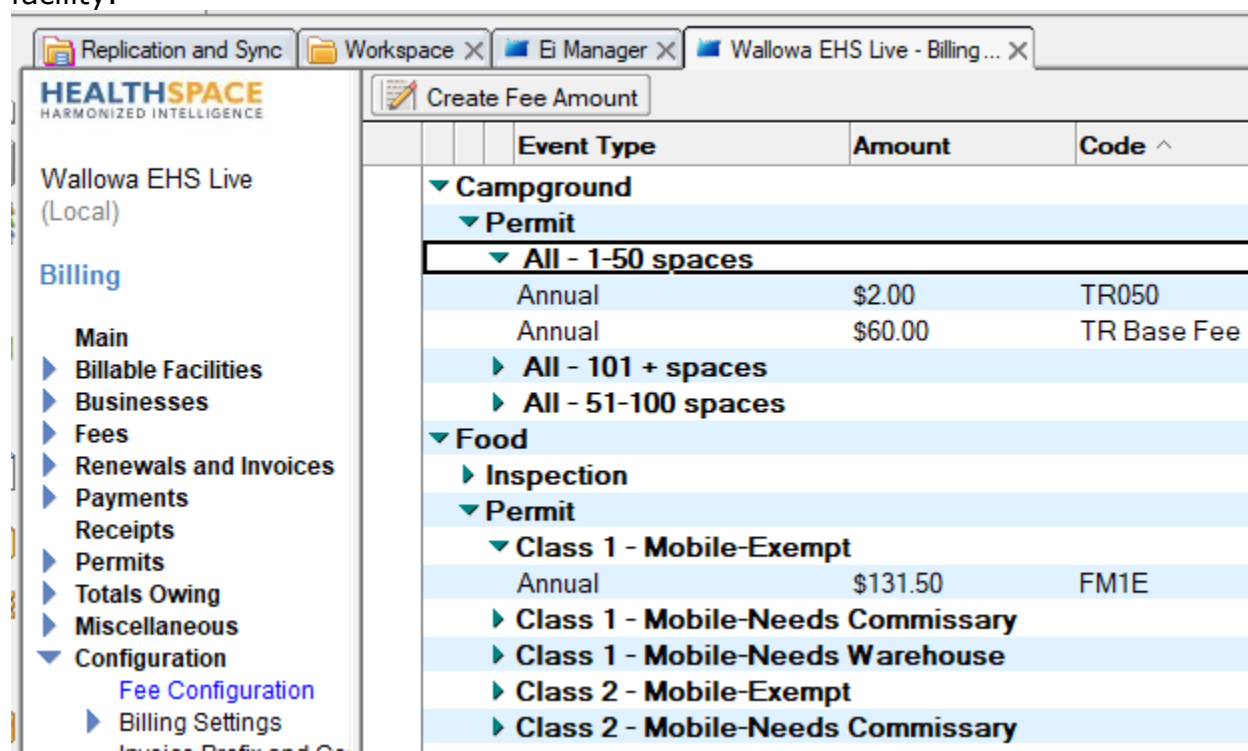
Use Invoice Prefix. If there will be more than one person at the Health District who will be generating invoices, you will want to choose "Yes" to the field Use Invoice Prefix, as it is the prefix that will keep the invoice numbering unique from person to person. When this is set, when creating an invoice, the user will be asked to set their invoice prefix.

Editing Fee Configuration Documents

After the System settings have been entered, configurable fee documents need to be created in the database to define the fee amounts for each fee type for each facility module and type.

This is done from the billing folder, under the Fees twistie, in the fee configuration view.

Fee documents for Permit/License fees, Inspection Fees and Specific Fees must be created for all facility types and all modules before beginning to work with billing a facility.



The screenshot shows the HealthSpace software interface. The left sidebar contains a navigation tree with the following items: Wallowa EHS Live (Local), Billing, Main, Billable Facilities, Businesses, Fees, Renewals and Invoices, Payments, Receipts, Permits, Totals Owing, Miscellaneous, Configuration, Fee Configuration, Billing Settings, and Invoice Prefix and Co. The main window is titled 'Create Fee Amount' and displays a table with the following columns: Event Type, Amount, and Code. The table is organized into a hierarchical structure with expandable sections.

Event Type	Amount	Code
▼ Campground		
▼ Permit		
▼ All - 1-50 spaces		
Annual	\$2.00	TR050
Annual	\$60.00	TR Base Fee
▶ All - 101 + spaces		
▶ All - 51-100 spaces		
▼ Food		
▶ Inspection		
▼ Permit		
▼ Class 1 - Mobile-Exempt		
Annual	\$131.50	FM1E
▶ Class 1 - Mobile-Needs Commissary		
▶ Class 1 - Mobile-Needs Warehouse		
▶ Class 2 - Mobile-Exempt		
▶ Class 2 - Mobile-Needs Commissary		

New fee documents can be created from this view, by clicking on the button at the top of the view; "Create fee amount". This opens a new document for setting up fee amounts:

Replication and Sync Workspace X Ei Manager X Wallowa EHS Live - Billing... X (Untitled) X	
Save Done Cancel	

Fee Definition	
Module Food General Hotel Pool School Summer Camp Temporary Vendor	UnCheck all Check all Facility Type <input type="checkbox"/> Class 3 <input type="checkbox"/> Class 4 <input type="checkbox"/> Commissary <input type="checkbox"/> Food-B&B <input checked="" type="checkbox"/> Restaurant <input type="checkbox"/> Vending <input type="checkbox"/> Warehouse
<input checked="" type="radio"/> Permit <input type="radio"/> Specific <input type="radio"/> Inspection <input type="radio"/> Violation	
Permit Type Annual	Billing Type 0-15 seats 16-50 seats 51-150 seats 151+ seats Mobile-Exempt Mobile-Needs Commissary Mobile-Needs Warehouse

Fee Details	
Fee Code FF015	Fee Amount \$367.50
<input type="checkbox"/> Fee Exempt	<input type="checkbox"/> Disable Pro Rating

Late Fee Options	
<input checked="" type="checkbox"/> Late Fee	<input checked="" type="checkbox"/> Repeats
Late Fee Lenience (days) 0	Late Fee Amount \$100.00
<input type="radio"/> Percentage of Fee <input checked="" type="radio"/> Amount	

Late Fee Repeat Options	
Repeat Frequency (days) 30	Repeat # Times (0 = no max) 0

For each fee amount that is created, indicate if it is for an inspection, permit or specific fee amount. Choose which facility type it is for, facility type, and if applicable indicate the billing type.

Choose a fee amount, and if a late fee would pertain to this fee, use the check mark next to "Late fee". A zero under Late Fee Lenience means that the late fee will be charged Jan 1 and every 30d after. A 31 would start late fees on Feb 1.

If you charge additional late fees, use a check mark in the applicable field. This opens fields to choose how many days after the current license expires should the late fee be applied. If the late fee will be a percentage of the original use the available radio button, and enter the percentage amount. If it is a specific amount, choose "Amount" and enter the value.

Close the form with the OK button. If the Late fee repeats enter how many days after the late fee should another fee be generated, and how often another fee will be charged.

Use the checkbox "Additional fee" for instances such as a Recreational Park or Campground if you have a set fee for a specific number of sites but charge an amount for each site over the set fee. For example: a health district might charge an amount for a campsite of 50-100 sites the amount of \$500.00, and every site over this amount might be charged an additional amount of \$5.00. When this is case, enter the number of sites on the campground facility document, and the system will auto-generate an amount based on that field.

Exempt Fee documents: If a permit will be issued to a facility type, however this facility is exempt from having to pay a permit fee, set up the fee document as usual, however do not put a fee amount in, select the Exempt check box instead:

The image shows two screenshots of a software interface. The top screenshot is the 'Fee Definition' form. It has a 'Module' dropdown set to 'Food'. The 'Facility Type' list includes 'Class 3', 'Class 4', 'Commissary', 'Food-B&B', 'Restaurant' (checked), 'Vending', and 'Warehouse'. The 'Permit Length (months)' is set to 12. The 'Permit Type' is set to 'Annual'. The 'Billing Type' list includes 'Commissary', 'Warehouse', 'Limited Service', 'Vending 1-10', 'Vending 11-20', 'Food B&B', and 'Fee Exempt Food Service' (selected). The 'Renewal Print Form' section has 'Hard Coded' checked. The 'Permit Print Form' section has 'Hard Coded' checked. The bottom screenshot is the 'Fee Details' form. It shows 'Fee Code' as 'FEF' and 'Fee Amount' as '0'. The 'Fee Exempt' checkbox is checked, and the 'Disable Pro Rating' checkbox is unchecked.

Fee Definition	
Module Food	UnCheck all Check all
Facility Type <input type="checkbox"/> Class 3 <input type="checkbox"/> Class 4 <input type="checkbox"/> Commissary <input type="checkbox"/> Food-B&B <input checked="" type="checkbox"/> Restaurant <input type="checkbox"/> Vending <input type="checkbox"/> Warehouse	
Permit Length (months) 12	
Permit Type Annual	Billing Type Commissary Warehouse Limited Service Vending 1-10 Vending 11-20 Food B&B Fee Exempt Food Service
Renewal Print Form <input type="checkbox"/> Hard Coded	
Permit Print Form <input checked="" type="checkbox"/> Hard Coded	

Fee Details	
Fee Code FEF	Fee Amount 0
<input checked="" type="checkbox"/> Fee Exempt	<input type="checkbox"/> Disable Pro Rating

Permit fees are now available for fees created from the facility document for new facilities, or during a renewal run.

After entering Inspection fees documents, the fee will be automatically generated when an Inspection of the correct type is saved in the system.

Specific fees can be generated manually from the facility once these values have been entered into fee documents in the fee configuration view. An example is a plan review fee.

Miscellaneous

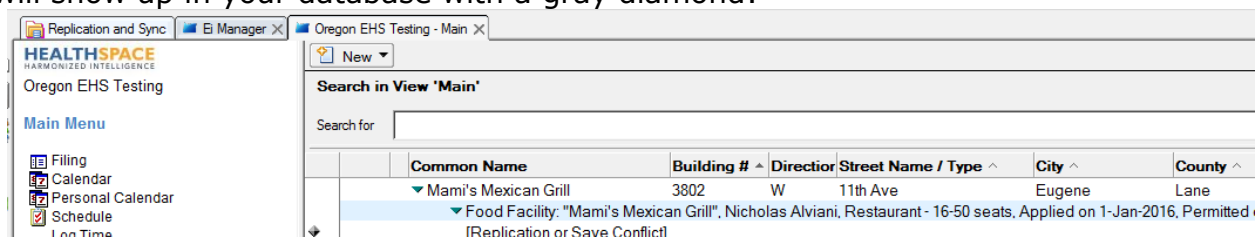
Replication and Save Conflicts

Replication conflicts are caused in a few different ways, but they generally occur when two people work in/save the same document/facility at close to the same time. When this happens, it will create a copy of that doc on the server to ensure that you have all your info. Most of the time, the Replication or Save Conflict can be deleted after a quick review.

They exist because the server has had several save hits on the same document—this can happen from two people working on the same doc at the same time and is very common during the billing season because inspectors are inspecting the facility while the support staff are entering billing data into the document at the same time. It can also happen if you have a document open for a long time and hit Save repeatedly.

It is especially important to ensure the document you save has ALL your data before deleting the conflict during the heavy licensing period since the conflict may have fee payment information.

They will show up in your database with a gray diamond:



This can also happen if inspectors or office staff leave facility doc open a long time because the system will auto-save a copy periodically to ensure no data is lost.

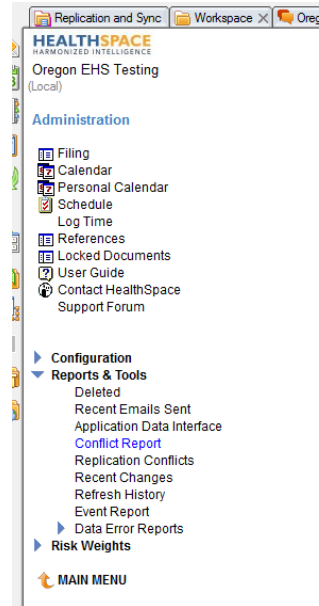
If you get a Replication error message, you can either say OK to create a separate facility or you can say no, that you don't want to save the facility. Then just close and cancel out of facility and it will not save the conflict. If you say yes, then you can easily just look for the conflict doc and just delete it.

When reviewing these Replication or Save Conflicts, you should:
First open conflict doc (always do this first so you can tell which tab is the conflict

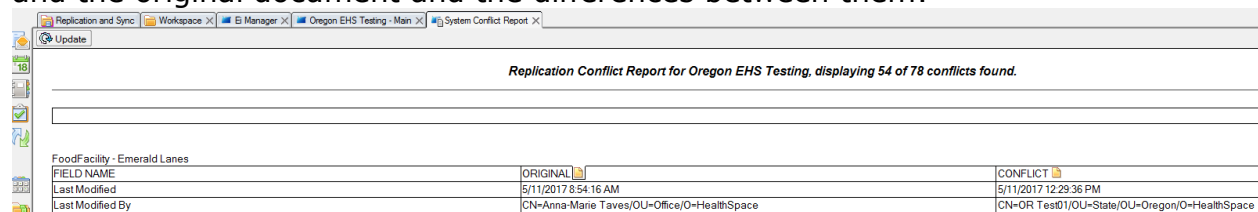
Then open the original. This will open as the second tab on your screen

If the conflict document has good info, make changes on original and then delete the conflict document after updates are made and they are identical.

There is a tool for office staff to see a list of all conflicts:
Main Menu>Administration>Reports&Tools>Conflict Report:



Click the Update button at the top of the screen and it will show you the conflict and the original document and the differences between them:



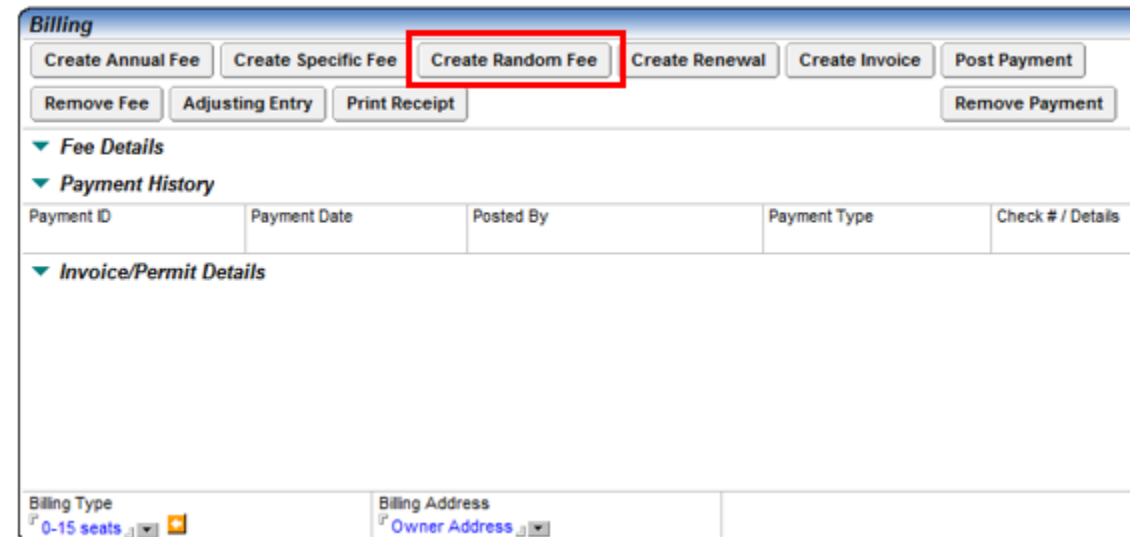
Then you can go to the Main Menu to final all the conflicts and delete them or make changes as necessary

Pro-rating Licenses

If you want to prorate your license fees after October 1st or if you have changed your fees for the next licensing year, you MUST Create Random Fee instead of Create Annual Fee to pay/generate a license.

- 1) Enter new child facility or change of ownership like normal

2) In the Billing section, hit the **Create Random fee** and assign half the previous license fee:



Billing

Create Annual Fee Create Specific Fee **Create Random Fee** Create Renewal Create Invoice Post Payment

Remove Fee Adjusting Entry Print Receipt Remove Payment

▼ **Fee Details**

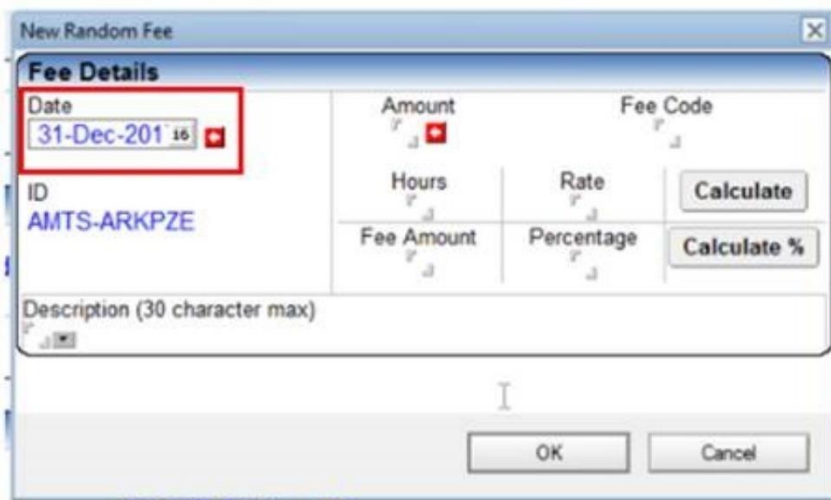
▼ **Payment History**

Payment ID	Payment Date	Posted By	Payment Type	Check # / Details
------------	--------------	-----------	--------------	-------------------

▼ **Invoice/Permit Details**

Billing Type: 0-15 seats Billing Address: Owner Address

3) Enter a fee date of **Dec 31, current year**—this is CRITICAL:



New Random Fee

Fee Details

Date: 31-Dec-2016

ID: AMTS-ARKPZE

Description (30 character max):

Amount Fee Code

Hours Rate Calculate

Fee Amount Percentage Calculate %

OK Cancel

4) Then enter half of the appropriate license fee if you are prorating or the regular fee if you are not. It will auto-calculate for you as well if you enter the full fee amount in the bottom box and then 50 in the Percentage box and hit Calculate:

New Random Fee

Fee Details

Date: 31-Dec-2016

Amount: \$236.25

Fee Code:

ID: AMTS-ARLMAZ

Hours:

Rate:

Calculate

Fee Amount: \$472.50

Percentage: 50

Calculate %

Description (30 character max):

OK Cancel

5) Finally, enter a Description type of **Annual Permit**—also CRITICAL—do not add anything in front of this specific text:

New Random Fee

Fee Details

Date: 31-Dec-2016

Amount: 120.00

Fee Code:

ID: AMTS-ARKPZE

Hours:

Rate:

Calculate

Fee Amount:

Percentage:

Calculate %

Description (30 character max): Annual Permit

OK Cancel

6) Then say OK and you will get a message. Say Yes, and the license will be available to print:

Permit Fee

? 'Annual Permit' at the beginning of the description is reserved for facility permit fees. Are you sure you want to continue?

Yes No

7) Post payment to the license and then print like normal

****For facilities with more than one fee, like Recreational Parks, you will need to enter each fee separately****

Generating next year's licenses for facilities that open after your renewals/billing run

You have two choices here:

- This is automated so that once you post payment, it knows that the facility is ready for its 2018 permit fee. It will generate the new fee overnight and generate the renewal.
- If you don't want to wait, you can click on Create Annual Fee and it will create next year's fee and Create Renewal so you can print it right from this screen (or from the ready to print view)

Then you should then see both a 2017 license and a 2018 renewal for the facility:

The screenshot shows a web-based billing interface. At the top, there are several buttons: 'Create Annual Fee', 'Create Specific Fee', 'Create Random Fee', 'Create Renewal', 'Post Payment', 'Create Invoice', 'Remove Payment', 'Remove Fee', 'Adjusting Entry', and 'Print Receipt'. Below these buttons is a section titled 'Fee Details' which contains a table with the following data:

Fee Type	Fee ID	Fee Date	By	Amount	Paid	Balance	Payment History
Annual Permit-FF150	AMTS-ARLMEM	31-Dec-2018	Anna-Marie Taves	\$472.50	\$0.00	\$472.50	
Annual Permit-FF150	AMTS-ARLMD3	31-Dec-2017	Anna-Marie Taves	\$236.25	\$236.25	\$0.00	AMTS-ARLMDK \$236.25

Below the table is a section titled 'Payment History' and another titled 'Invoice/Permit Details'. The 'Invoice/Permit Details' section shows:

Permit # AMTS-ARLM9N for Amf's New food est. Expires 31-Dec-2017
Renewal Notice amt201800020 for Amf's New food est., 01-Jan-2018 for \$472.50

At the bottom, there are fields for 'Billing Type' (51-150 seats) and 'Billing Address' (Owner Address). A status bar at the bottom right indicates: 'Billable = Yes (Master Settings Disabled: No, Billing Settings Permittable: Yes, Billable)'

Choosing Between Second/Third/Final Renewals or Invoices

****Note: These are for payment reminders sent BEFORE late fees are assessed. Once late fees begin after the first of the year, HS will auto-generate renewals with late fees added for the facilities that are still owing. These will be available in the Ready to Print View.****

Because different counties have different preferences how they like to send out reminder notices, we have expanded the options you have available. You now have two options for issuing additional notices of license revenue due:

- 1) Second (or Third or Final) Notice correspondence document or;
- 2) A total owing Invoice document

Here are the pros and cons of each option and an example of each:

Notice Type	Pro	Con
Second Notice document	Has clear header showing Second Notice with due date of 12/31/2019	Can group by licensee for printing, but the process is more detailed
Invoice document	Easier to sort and print by licensee Shows up in the list of documents under Renewals and Invoices	Has a randomly generated invoice number that will not match the original renewal number (can be an issue with corporate chains) Header shows 'due upon receipt' instead of date

Second Notice Example:

Alpine Meadows Golf Club
PO BOX 238
Enterprise, OR 97828

Facility Name: Alpine Meadows Golf Club

Owner Phone: (541) 426-3246

Owner Email:

Physical Address: 66098 Golf Course Rd
Enterprise, OR 97828

Facility Phone: (541) 426-3246

Facility Contact:

SECOND NOTICE - DUE AND PAYABLE NO LATER THAN: December 31, 2018

Invoice Example:

Alpine Meadows Golf Club
PO BOX 238
Enterprise, OR 97828

Facility Name: Alpine Meadows Golf Club

Owner Phone: (541) 426-3246

Owner Email:

Physical Address: 66098 Golf Course Rd
Enterprise, OR 97828

Facility Phone: (541) 426-3246

Facility Contact:

INVOICE DUE AND PAYABLE UPON RECEIPT

The following pages will give you instructions on each option.

Creating Second/Third/Final Notices from the Totals Owing View

Go to Main Menu>Billing>Totals Owing:

Facility	Facility ID	Licensee	Outstanding Fees	Owing	Paid	Amount
Alpine Meadows Golf Club				\$414.75	\$498.00	\$912.75
Barto Schuld				\$156.00	\$82.00	\$238.00
Becky Rushton				\$414.75	\$414.75	\$829.50
Becky & Scott Rushton				\$120.00	\$120.00	\$240.00
Beth Gibans				\$367.50	\$441.00	\$808.50
Brian Walker				\$116.00	\$147.00	\$263.00
C & D Johnson Enterprises, Inc				\$414.75	\$498.00	\$912.75
Casey Jones & Jera Wollenburg				\$131.50	\$158.00	\$289.50
Christina & Jeremiah Moffit				\$414.75	\$498.00	\$912.75
Darrell Anderson				\$60.00	\$88.00	\$148.00
Derek Winn				\$367.50	\$441.00	\$808.50
Edie Baffaro				\$131.50	\$158.00	\$289.50
Free Associates LLC				\$60.00	\$88.00	\$148.00

Then click the + at the top of the screen to open all the facilities.

Facility	Facility ID	Licensee	Outstanding Fees	Owing	Paid	Amount
Alpine Meadows Golf Club				\$414.75	\$498.00	\$912.75
Food Facility: Alpine Meadows Golf Club	NFRY-AJVTWF	Alpine Meadows	31-Dec-2019 \$414.75	\$414.75	\$498.00	\$912.75
Barto Schuld				\$156.00	\$82.00	\$238.00
Camp Facility: Park At The River	NFRY-AJVTVL	Barto Schuld	31-Dec-2019 \$60.00 : 3	\$156.00	\$82.00	\$238.00
Becky Rushton				\$414.75	\$414.75	\$829.50
Food Facility: Outlaw Restaurant & Bar	NFRY-AJVTKW	Becky Rushton	31-Dec-2019 \$414.75	\$414.75	\$414.75	\$829.50
Becky & Scott Rushton				\$120.00	\$120.00	\$240.00
Hotel Facility: East Street Cottage	NFRY-AJVU9Z	Becky & Scott	31-Dec-2019 \$60.00	\$60.00	\$60.00	\$120.00
Hotel Facility: Indian Lodge Motel	NFRY-AJVUA2	Becky & Scott	31-Dec-2019 \$60.00	\$60.00	\$60.00	\$120.00
Beth Gibans				\$367.50	\$441.00	\$808.50
Food Facility: Backyard Gardens	NFRY-AJVTKX	Beth Gibans	31-Dec-2019 \$367.50	\$367.50	\$441.00	\$808.50
Brian Walker				\$116.00	\$147.00	\$263.00
Camp Facility: Loghouse Rv Park	NFRY-AJVTVU	Brian Walker	31-Dec-2019 \$60.00 : 3	\$116.00	\$147.00	\$263.00

If you don't care about the printing order, then just select all by check marking them, hit the Create Correspondence (Batch) button on the top of the screen, and say Yes when it prompts you to add them to the Ready to Print view:

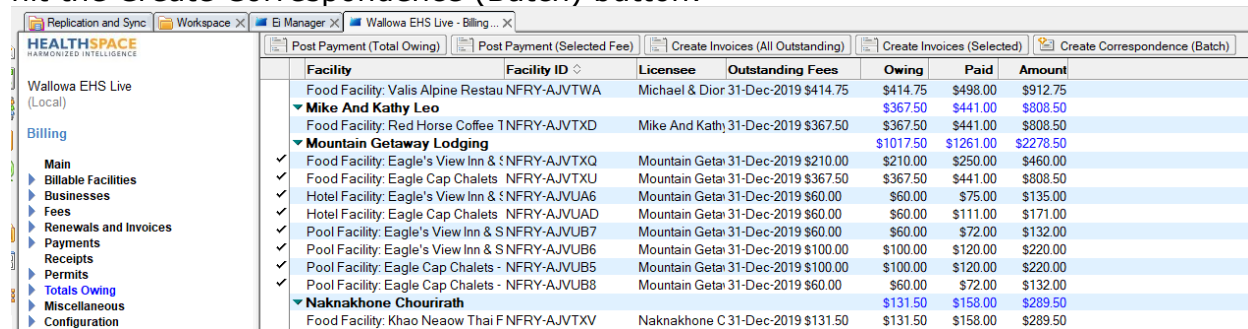
Correspondence

Select a Print Form:

Name	Description
Alpine Meadows Golf Club	Final Notice Renewal
Barto Schuld	Second Notice Renewal
Becky Rushton	Third Notice Renewal
Becky & Scott Rushton	Campground
Becky & Scott Rushton	Food
Beth Gibans	Food Vending
Brian Walker	Hotel
C & D Johnson Enterprises, Inc	Letters
Casey Jones & Jera Wollenburg	Org Camp
Christina & Jeremiah Moffit	Pool
Darrell Anderson	Resident Camp
Derek Winn	RV Park/Camp
Edie Baffaro	School
Free Associates LLC	Temporary Vendor

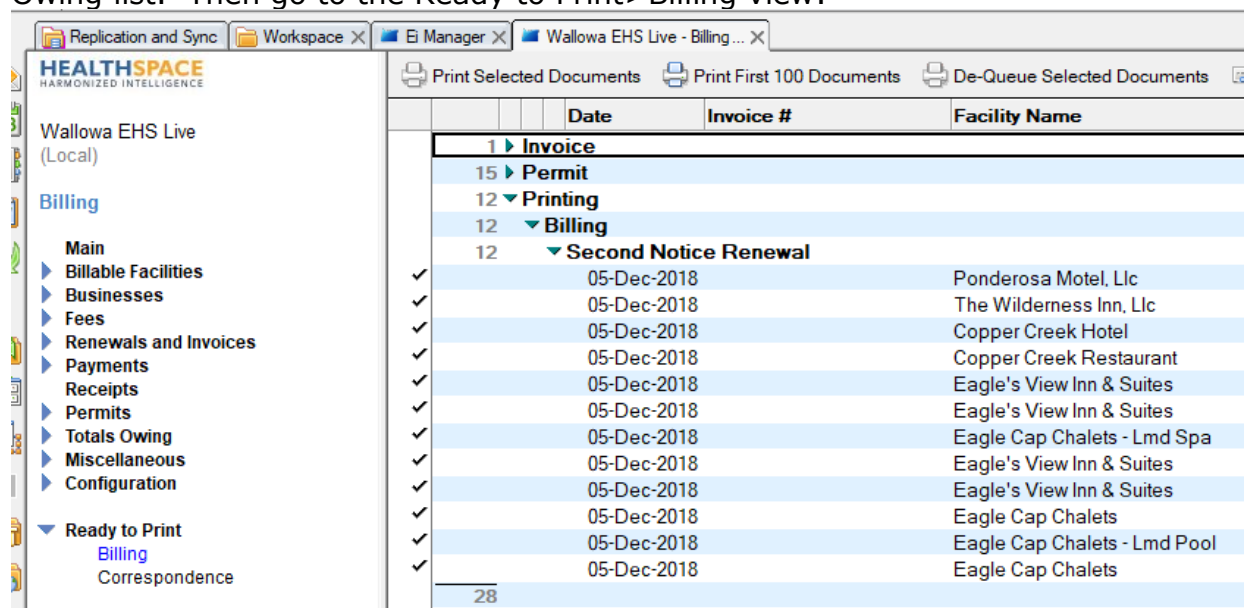
OK Cancel

If you would like to print them so that those facilities with the same owner print together, then select any items that have the same owner with a check mark and hit the Create Correspondence (Batch) button:



Facility	Facility ID	Licensee	Outstanding Fees	Owing	Paid	Amount
Food Facility: Valis Alpine Restau	NFRY-AJVTWA	Michael & Dior	31-Dec-2019 \$414.75	\$414.75	\$498.00	\$912.75
▼ Mike And Kathy Leo				\$367.50	\$441.00	\$808.50
Food Facility: Red Horse Coffee	TNFRY-AJVTXD	Mike And Kathy	31-Dec-2019 \$367.50	\$367.50	\$441.00	\$808.50
▼ Mountain Getaway Lodging				\$1017.50	\$1261.00	\$2278.50
Food Facility: Eagle's View Inn & S	NFRY-AJVTXQ	Mountain Geta	31-Dec-2019 \$210.00	\$210.00	\$250.00	\$460.00
Food Facility: Eagle Cap Chalets	NFRY-AJVTXU	Mountain Geta	31-Dec-2019 \$367.50	\$367.50	\$441.00	\$808.50
Hotel Facility: Eagle's View Inn & S	NFRY-AJVUA6	Mountain Geta	31-Dec-2019 \$60.00	\$60.00	\$75.00	\$135.00
Hotel Facility: Eagle Cap Chalets	NFRY-AJVUAD	Mountain Geta	31-Dec-2019 \$60.00	\$60.00	\$111.00	\$171.00
Pool Facility: Eagle's View Inn & S	NFRY-AJVUB7	Mountain Geta	31-Dec-2019 \$60.00	\$60.00	\$72.00	\$132.00
Pool Facility: Eagle's View Inn & S	NFRY-AJVUB6	Mountain Geta	31-Dec-2019 \$100.00	\$100.00	\$120.00	\$220.00
Pool Facility: Eagle Cap Chalets -	NFRY-AJVUB5	Mountain Geta	31-Dec-2019 \$100.00	\$100.00	\$120.00	\$220.00
Pool Facility: Eagle Cap Chalets -	NFRY-AJVUB8	Mountain Geta	31-Dec-2019 \$60.00	\$60.00	\$72.00	\$132.00
▼ Naknakhone Chourirath				\$131.50	\$158.00	\$289.50
Food Facility: Khao Neaow Thai F	NFRY-AJVTXV	Naknakhone C	31-Dec-2019 \$131.50	\$131.50	\$158.00	\$289.50

Repeat this for each grouping of facilities until you reach the bottom of the Totals Owing list. Then go to the Ready to Print>Billing view:



Date	Invoice #	Facility Name
1 ► Invoice		
15 ► Permit		
12 ▼ Printing		
12 ▼ Billing		
12 ▼ Second Notice Renewal		
05-Dec-2018		Ponderosa Motel, Llc
05-Dec-2018		The Wilderness Inn, Llc
05-Dec-2018		Copper Creek Hotel
05-Dec-2018		Copper Creek Restaurant
05-Dec-2018		Eagle's View Inn & Suites
05-Dec-2018		Eagle's View Inn & Suites
05-Dec-2018		Eagle Cap Chalets - Lmd Spa
05-Dec-2018		Eagle's View Inn & Suites
05-Dec-2018		Eagle's View Inn & Suites
05-Dec-2018		Eagle Cap Chalets
05-Dec-2018		Eagle Cap Chalets - Lmd Pool
05-Dec-2018		Eagle Cap Chalets
28		

Put a check mark by the documents and send them to the printer. The notices will print out keeping all the facilities with the same owner together.

Then you can go back into the Totals Owing view and select all the single entries you haven't created notices for yet and click Create Correspondence (Batch) to finish up the rest of the facilities:

HEALTHSPACE HARMONIZED INTELLIGENCE		Wallowa EHS Live - Billing ... X						
		Post Payment (Total Owing)		Post Payment (Selected Fee)		Create Invoices (All Outstanding)		Create Invoices (Selected)
								Create Correspondence (Batch)
		Facility	Facility ID	Licensee	Outstanding Fees	Owing	Paid	Amount
<div>Wallowa EHS Live (Local)</div> <div>Billing</div> <div>Main</div> <div>Billable Facilities</div> <div>Businesses</div> <div>Fees</div> <div>Renewals and Invoices</div> <div>Payments</div> <div>Receipts</div> <div>Permits</div> <div>Totals Owing</div> <div>Miscellaneous</div> <div>Configuration</div> <div>Ready to Print</div> <div>Billing</div> <div>Correspondence</div> <div>Certification</div> <div>MAIN MENU</div>		✓ Food Facility: Red Rooster Cafe	NFRY-AJVTX7	Kim Moore & S	31-Dec-2019 \$472.50	\$472.50	\$567.00	\$1039.50
		▼ Kimberly D Carlston				\$472.50	\$567.00	\$1039.50
		✓ Food Facility: Rimrock Inn	NFRY-AJVTWM	Kimberly D Car	31-Dec-2019 \$472.50	\$472.50	\$567.00	\$1039.50
		▼ Kris & Darin Naisbitt				\$120.00	\$182.00	\$302.00
		Hotel Facility: Ponderosa Motel, L	NFRY-AJVU9W	Kris & Darin Na	31-Dec-2019 \$60.00	\$60.00	\$107.00	\$167.00
		Hotel Facility: The Wilderness Inn	NFRY-AJVU9U	Kris & Darin Na	31-Dec-2019 \$60.00	\$60.00	\$75.00	\$135.00
		▼ Lake Wallowa Lodge, LLC				\$532.50	\$671.00	\$1203.50
		Food Facility: Wallowa Lake Lodg	NFRY-AJVTXM	Lake Wallowa	31-Dec-2019 \$472.50	\$472.50	\$567.00	\$1039.50
		Hotel Facility: Wallowa Lake Lodg	NFRY-AJVUA8	Lake Wallowa	31-Dec-2019 \$60.00	\$60.00	\$104.00	\$164.00
		▼ Leobardo Arenas				\$414.75	\$498.00	\$912.75
		✓ Food Facility: El Bajio	NFRY-AJVTWT	Leobardo Arer	31-Dec-2019 \$414.75	\$414.75	\$498.00	\$912.75
		▼ Loretta Wallace				\$367.50	\$158.00	\$525.50
		✓ Food Facility: Blue Banana, The	NFRY-AJVTY4	Loretta Wallac	31-Dec-2019 \$367.50	\$367.50	\$158.00	\$525.50
		▼ Lorraine & Jan Swift				\$94.00	\$82.00	\$176.00
		✓ Camp Facility: Wallowa Valley Ste	NFRY-AJVTVQ	Lorraine & Jan	31-Dec-2019 \$60.00 : 3	\$94.00	\$82.00	\$176.00
		▼ Maria Del Carmen Mendez				\$131.50	\$158.00	\$289.50
		✓ Food Facility: Taco Feliz	JBEK-AXNSXL	Maria Del Cam	31-Dec-2019 \$131.50	\$131.50	\$158.00	\$289.50
		▼ Mark Thornberg				\$427.50	\$516.00	\$943.50
		Food Facility: Matterhorn Village	NFRY-AJVTWW	Mark Thornber	31-Dec-2019 \$367.50	\$367.50	\$441.00	\$808.50
		Hotel Facility: Matterhorn Village	NFRY-AJVUA4	Mark Thornber	31-Dec-2019 \$60.00	\$60.00	\$75.00	\$135.00
		▼ Martin S Hamilton				\$70.00	\$82.00	\$152.00
		✓ Camp Facility: Five Peaks Rv Par	NFRY-AJVTVR	Martin S Hamil	31-Dec-2019 \$60.00 : 3	\$70.00	\$82.00	\$152.00
		▼ Mary Swanson				\$367.50	\$441.00	\$808.50
		✓ Food Facility: Bookloft, The	NFRY-AJVTXC	Mary Swanson	31-Dec-2019 \$367.50	\$367.50	\$441.00	\$808.50
		▼ Mary Wolfe				\$735.00	\$425.00	\$1160.00
		✓ Food Facility: Mad Mary's	JBEK-APLUXD	Mary Wolfe	31-Dec-2019 \$367.50 : :	\$735.00	\$425.00	\$1160.00
		▼ Melissa Keene & Jessica Clary				\$472.50	\$567.00	\$1039.50
		✓ Food Facility: Horseshoe Bar And	NFRY-AJVTWN	Melissa Keene	31-Dec-2019 \$472.50	\$472.50	\$567.00	\$1039.50
		▼ Michael & Dionne Vali				\$414.75	\$498.00	\$912.75
		✓ Food Facility: Valis Alpine Restau	NFRY-AJVTWA	Michael & Dior	31-Dec-2019 \$414.75	\$414.75	\$498.00	\$912.75
		▼ Mike And Kathy Leo				\$367.50	\$441.00	\$808.50
		✓ Food Facility: Red Horse Coffee	TNFRY-AJVTXD	Mike And Kathy	31-Dec-2019 \$367.50	\$367.50	\$441.00	\$808.50
		▼ Mountain Getaway Lodging				\$1017.50	\$1261.00	\$2278.50
		Food Facility: Eagle's View Inn & :	NFRY-AJVTXQ	Mountain Geta	31-Dec-2019 \$210.00	\$210.00	\$250.00	\$460.00
		Food Facility: Eagle Cap Chalets	NFRY-AJVTXU	Mountain Geta	31-Dec-2019 \$367.50	\$367.50	\$441.00	\$808.50
		Hotel Facility: Eagle's View Inn & :	NFRY-AJVUA6	Mountain Geta	31-Dec-2019 \$60.00	\$60.00	\$75.00	\$135.00
		Hotel Facility: Eagle Cap Chalets	NFRY-AJVUAD	Mountain Geta	31-Dec-2019 \$60.00	\$60.00	\$111.00	\$171.00

Finally, go to Ready to Print>Billing and print these and you are done!

Creating Invoices from the Totals Owing View

Go to Main Menu>Billing>Totals Owing>By Facility Type:

Replication and Sync | Bi Manager | Oregon EHS Testing - Billing ... X

HEALTHSPACE
HARMONIZED INTELLIGENCE

Oregon EHS Testing (Local)

Billing

Main

- Billable Facilities
 - By Business
 - By Type
 - By Locality
 - By End Date
 - By Locality/End Date
 - By Not Invoiced
 - Problems
- Businesses
- Fees
- Renewals and Invoices
 - Ready to Print
 - By Office and Fee Date
 - By Date
 - By Billing Address
 - By Facility Name
 - Uncollectable
- Payments
- Receipts
- Permits
- Totals Owing
 - By Facility Type
 - Sortable
 - Fees By End Date

Post Payment (Total Owing) | Post Payment (Selected Fee) | Create Invoices (All Outstanding)

Search in View 'Billing\Amounts Owing\By Facility Type'

Search for

#	End Date	Type	Total
✓	31-Dec-2017	Annual Permit~SUR1-50	\$0.53
✓	2	Heceta Beach Rv Park (NFRY-AAQHQB)	\$467.50
✓	31-Dec-2017	Annual Permit~Surcharge	\$47.50
✓	31-Dec-2017	Annual Permit~Base Fee	\$420.00
✓	21	Food	\$4,439.75
✓	21	Restaurant	\$4,439.75
✓	1	221 Bce (NFRY-AAQ55W)	\$367.50
✓	31-Dec-2017	Annual Permit~FF015	\$367.50
✓	1	3 Of A Kind Deli (NFRY-AAQ3K9)	\$367.50
✓	31-Dec-2017	Annual Permit~FF015	\$367.50
✓	1	Govindas Vegetarian Buffet (NFRY-AAQ2DK)	\$414.75
✓	31-Dec-2017	Annual Permit~FF050	\$414.75
✓	14	Hacienda Amigo Mio (AMTS-ADMLW6)	\$2,145.00
✓	26-Nov-2016	Late Fee (330 d), Permit AMTS-AFDPBZ	\$100.00
✓	31-Mar-2016	Late Fee (90 d), Permit AMTS-AFDPBZ	\$100.00
✓	31-Jan-2016	Late Fee (30 d), Permit AMTS-AFDPBZ	\$100.00
✓	31-Dec-2017	Annual Permit~FF150	\$472.50
✓	31-Dec-2016	Annual Permit~FF150	\$472.50
✓	30-May-2016	Late Fee (150 d), Permit AMTS-AFDPBZ	\$100.00
✓	30-Apr-2016	Late Fee (120 d), Permit AMTS-AFDPBZ	\$100.00
✓	29-June-2016	Late Fee (180 d), Permit AMTS-AFDPBZ	\$100.00
✓	30-Jul-2016	Late Fee (210 d), Permit AMTS-AFDPBZ	\$100.00

Click on the green plus at the top of the screen to ensure all twisties are open
Click Create Invoices (All Outstanding):

Replication and Sync | Bi Manager | Oregon EHS Testing - Billing ... X

HEALTHSPACE
HARMONIZED INTELLIGENCE

Oregon EHS Testing (Local)

Billing

Main

- Billable Facilities
 - By Business
 - By Type
 - By Locality
 - By End Date
 - By Locality/End Date
 - By Not Invoiced
 - Problems
- Businesses
- Fees
- Renewals and Invoices
 - Ready to Print
 - By Office and Fee Date
 - By Date
 - By Billing Address
 - By Facility Name
 - Uncollectable
- Payments
- Receipts
- Permits
- Totals Owing
 - By Facility Type
 - Sortable
 - Fees By End Date

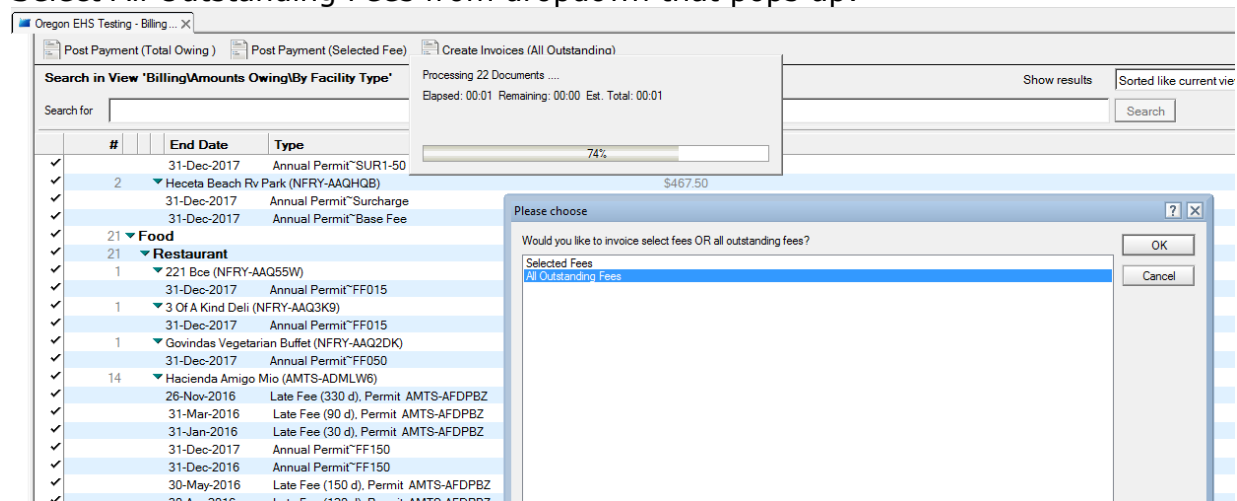
Post Payment (Total Owing) | Post Payment (Selected Fee) | **Create Invoices (All Outstanding)**

Search in View 'Billing\Amounts Owing\By Facility Type'

Search for

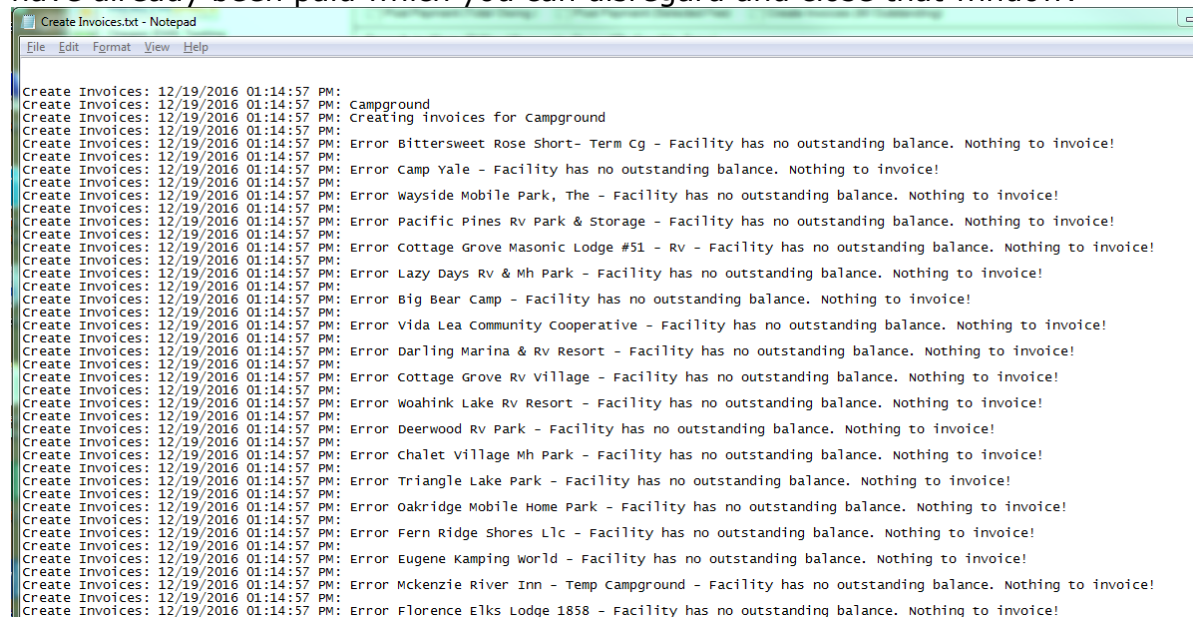
#	End Date	Type	Total
✓	31-Dec-2017	Annual Permit~SUR1-50	\$0.53
✓	2	Heceta Beach Rv Park (NFRY-AAQHQB)	\$467.50
✓	31-Dec-2017	Annual Permit~Surcharge	\$47.50
✓	31-Dec-2017	Annual Permit~Base Fee	\$420.00
✓	21	Food	\$4,439.75
✓	21	Restaurant	\$4,439.75
✓	1	221 Bce (NFRY-AAQ55W)	\$367.50
✓	31-Dec-2017	Annual Permit~FF015	\$367.50
✓	1	3 Of A Kind Deli (NFRY-AAQ3K9)	\$367.50
✓	31-Dec-2017	Annual Permit~FF015	\$367.50
✓	1	Govindas Vegetarian Buffet (NFRY-AAQ2DK)	\$414.75
✓	31-Dec-2017	Annual Permit~FF050	\$414.75
✓	14	Hacienda Amigo Mio (AMTS-ADMLW6)	\$2,145.00
✓	26-Nov-2016	Late Fee (330 d), Permit AMTS-AFDPBZ	\$100.00
✓	31-Mar-2016	Late Fee (90 d), Permit AMTS-AFDPBZ	\$100.00
✓	31-Jan-2016	Late Fee (30 d), Permit AMTS-AFDPBZ	\$100.00
✓	31-Dec-2017	Annual Permit~FF150	\$472.50
✓	31-Dec-2016	Annual Permit~FF150	\$472.50
✓	30-May-2016	Late Fee (150 d), Permit AMTS-AFDPBZ	\$100.00
✓	30-Apr-2016	Late Fee (120 d), Permit AMTS-AFDPBZ	\$100.00
✓	29-June-2016	Late Fee (180 d), Permit AMTS-AFDPBZ	\$100.00
✓	30-Jul-2016	Late Fee (210 d), Permit AMTS-AFDPBZ	\$100.00

Select All Outstanding Fees from dropdown that pops up:



You will need to select All Outstanding Fees for each facility type, so don't worry if it pops up multiple times. It will also run through all the licenses to check them, so don't worry if the count on the screen is higher than the number of facilities you have owing.

When it is complete, it will then pop up an error report showing all the licenses that have already been paid which you can disregard and close that window:



To print by owner, sort by Licensee in the Ready to Print>Billing view, select just those facilities and print them. Repeat this for each grouping by owner and then you can print all the remaining renewals as a big batch. In this example, you would put a check next to the three that all have the same owner and then hit Print Selected Documents:

Date	Invoice #	Facility Name	Licensee
29-Nov-2018		The Dog Spot	Amy Wolf
21-Nov-2018		La Laguna Family Mexican Rest 2	Angelica N Zurita
21-Nov-2018		La Laguna Family Mexican Restaurant Inc	Angelica N Zurita
21-Nov-2018		Rusty Spur Bar & Grill	Angelica N Zurita
30-Nov-2018		Minam Lodge	Barnes Ellis
05-Dec-2018	EVE202000087	Park At The River	Berto Gohfeld
05-Dec-2018	EVE202000084	Outlaw Restaurant & Saloon	Becky Rushton
05-Dec-2018	EVE202000085	Indian Lodge Motel	Becky & Scott Rush
05-Dec-2018	EVE202000086	East Street Cottages	Becky & Scott Rush
05-Dec-2018	EVE202000083	Backyard Gardens LLC	Beth Gibans
05-Dec-2018	EVE202000088	Loghouse Rv Park & Campground	Brian Walker
26-Nov-2018		Chuckwagon Sisters Catering	Diana Wortman
30-Oct-2018		Troy Resort RV Park	Douglas P Witherrite
30-Oct-2018		Troy Resort Hotel	Douglas P Witherrite
30-Oct-2018		Troy Resort Wenaha Bar & Grill, LLC	Douglas P Witherrite
21-Nov-2018		Wallowa River Rv Park	Joe & Becky Rivern
26-Nov-2018		Main Street Grill	Katrina & Wylie Frei
26-Nov-2018		Belle Pepper's Bed & Breakfast	Norma "Pepper" Mc
26-Nov-2018		Belle Pepper's Bed & Breakfast	Norma "Pepper" Mc
26-Nov-2018		Little Bear Drive-in	Rhonda Fuller
29-Oct-2018		Imnaha Store And Tavern	Sallie J Tanzey

Once you have printed all the facilities with the same owner, just go back and select all and hit the Print Selected Documents.

And you are done!

Exempt Status Facilities

Use this status for School and General facilities to keep HS from trying to generate licenses for these facility types. It is not for fee-exempt facilities like a soup kitchen, which should be a permitted restaurant.

Facility Information		
Name Enterprise High & Elementary Schools	REHS Inspector Assignment	Administrative Status Active
Facility ID NFRY-AJVTY9	Hide From web <input type="radio"/> Yes <input type="radio"/> No	Facility Operation Hours Open <input type="text"/> Closed <input type="text"/>
FTID 3270003		
The Facility Is Open <input checked="" type="checkbox"/> All Year Round		

Operating Information		
Application Date 1-Jan-2017	Status Exempt	Date Permitted 1-Jan-2017
Issue Date	Expiration Date	

NSF Checks

Payment was made (but it was not valid) and you want the history of what happened to show up, so you don't want to just remove the payment.

Payment was already made, so leave that payment there and leave the original permit in the system (do NOT delete it!)

Hit Adjusting Entry button and add the total fee amount back

Then hit Create Random Fee and add your NSF charge amount, in the description call it 'NSF charge'

Here is what it will look like after all the adjustments have been made:

The screenshot shows a 'Billing' window with several buttons at the top: 'Create Annual Fee', 'Create Specific Fee', 'Create Random Fee', 'Create Renewal', 'Create Invoice', 'Remove Fee', 'Adjusting Entry', and 'Print Receipt'. Below the buttons are three sections:

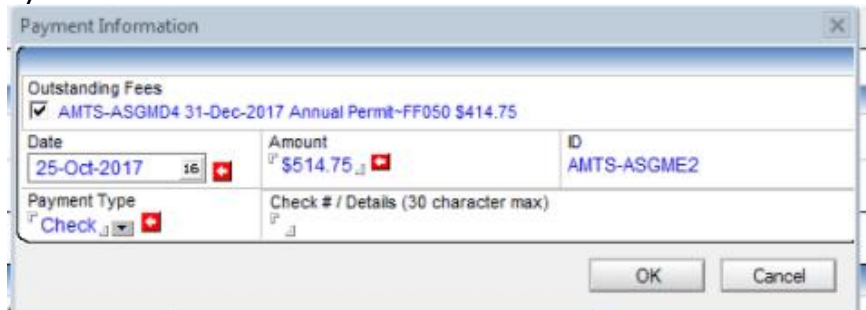
- Fee Details**: A table with columns 'Fee Type', 'Fee ID', 'Fee Date', and 'By'. It lists three entries: 'Misc NSF' (Fee ID: NHA-E-AS4TUR, Fee Date: 13-Oct-2017, By: Nancy Hale), 'adj NSF Check 1020' (Fee ID: NHA-E-AS4TU3, Fee Date: 13-Oct-2017, By: Nancy Hale), and 'Annual Permit-TM050' (Fee ID: NHA-E-ARBW2D, Fee Date: 31-Dec-2017, By: Nancy Hale).
- Payment History**: A table with columns 'Payment ID', 'Payment Date', 'Posted By', and 'Payment Type'. It lists two entries: 'NHA-E-AS4TUX' (Payment Date: 04-Oct-2017, Posted By: Nancy Hale, Payment Type: Credit) and 'NHA-E-ARBW2F' (Payment Date: 18-Sep-2017, Posted By: Nancy Hale, Payment Type: Check).
- Invoice/Permit Details**: A single line item showing 'Permit # NHA-E-ARBV29 for Lincoln City Value Inn, Expires 31-Dec-2017'.

If you need to, you can Create Invoice to send out to the operator. Or if you had already mailed out their license, you can just apply payment and be done.

Overpayments

It is recommended that you choose not to accept the check and require operators to submit the correct amount

However, if you take the incorrect check, then enter the amount they paid into the system:



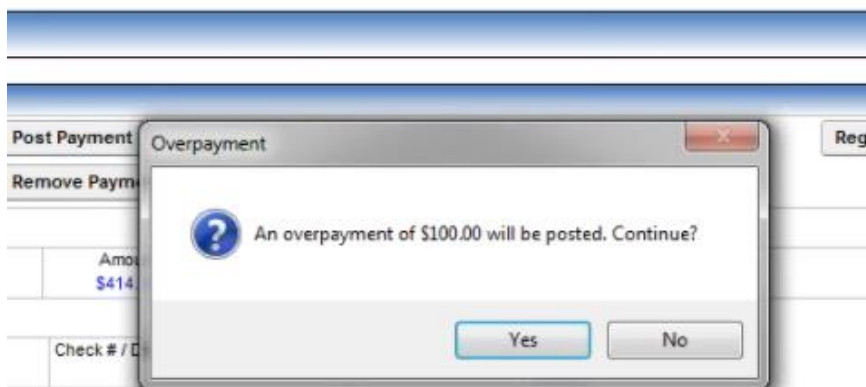
Payment Information

Outstanding Fees

☒ AMTS-ASGMD4 31-Dec-2017 Annual Permit-FF050 \$414.75

Date 25-Oct-2017	Amount \$514.75	ID AMTS-ASGME2
Payment Type Check	Check # / Details (30 character max)	

OK Cancel



Overpayment

An overpayment of \$100.00 will be posted. Continue?

Yes No

You will get a message, say OK

Then you should see the overpayment reflected in your Billing as Overpayment Details:



Billing

Create Annual Fee Create Specific Fee Create Random Fee Create Renewal Create Invoice Post Payment

Remove Fee Adjusting Entry Print Receipt Remove Payment

Fee Details

Fee Type	Fee ID	Fee Date	By	Amount	Paid
Annual Permit-FF050	AMTS-ASGMD4	31-Dec-2017	Anna-Marie Taves	\$414.75	\$414.75

Payment History

Payment ID	Payment Date	Posted By	Payment Type	Check # / Details
AMTS-ASGME2	25-Oct-2017	Anna-Marie Taves	Check	[none]

Overpayment Details

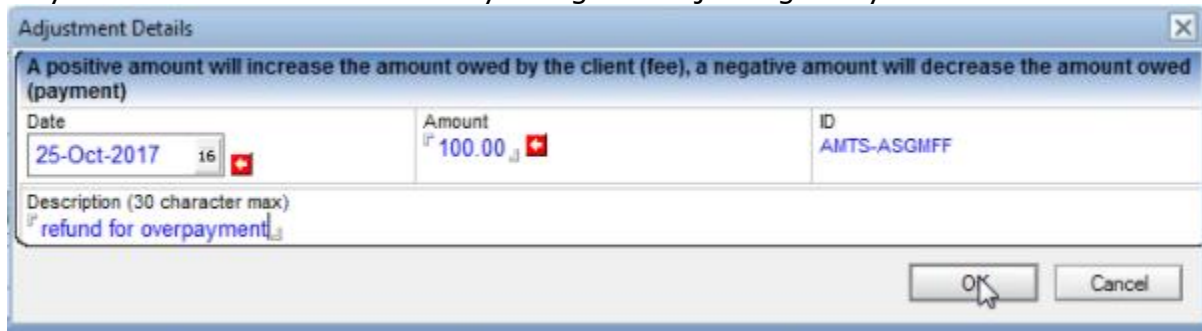
Payment ID	Payment Date	Posted By	Payment Amount	Outstanding
AMTS-ASGME2	25-Oct-2017	Anna-Marie Taves	\$100.00	\$100.00

Invoice/Permit Details

Billing Type 16-50 seats	Billing Address Owner Address
-----------------------------	----------------------------------

Billable = Yes (Master Settings Disab

At this point, you can do nothing and allow it to be a credit for next year's license, or you can document a refund by using the Adjusting Entry button:



Adjustment Details

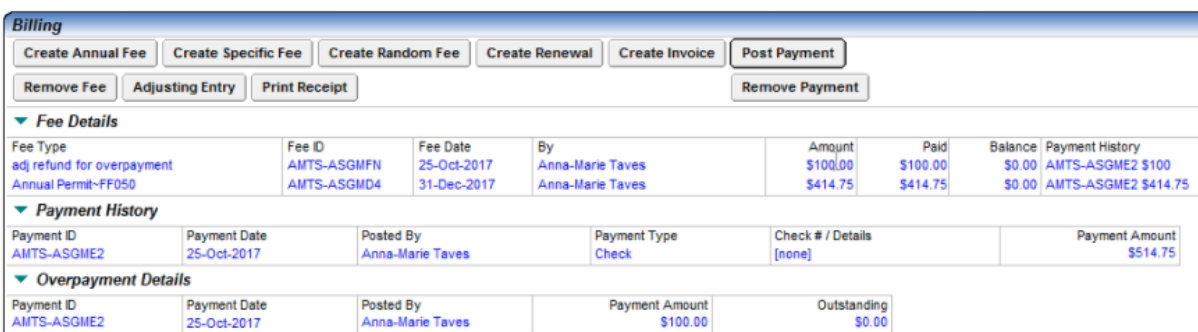
A positive amount will increase the amount owed by the client (fee), a negative amount will decrease the amount owed (payment)

Date: 25-Oct-2017 16 Amount: 100.00 ID: AMTS-ASGMFF

Description (30 character max): refund for overpayment

OK Cancel

Then you have to hit 'Post Payment' to apply this amount to their invoice and return you to a zero balance:



Billing

Create Annual Fee Create Specific Fee Create Random Fee Create Renewal Create Invoice Post Payment Remove Fee Adjusting Entry Print Receipt Remove Payment

▼ Fee Details

Fee Type	Fee ID	Fee Date	By	Amount	Paid	Balance	Payment History
adj refund for overpayment	AMTS-ASGMFFN	25-Oct-2017	Anna-Marie Taves	\$100.00	\$100.00	\$0.00	AMTS-ASGME2 \$100
Annual Permit-FF050	AMTS-ASGMD4	31-Dec-2017	Anna-Marie Taves	\$414.75	\$414.75	\$0.00	AMTS-ASGME2 \$414.75

▼ Payment History

Payment ID	Payment Date	Posted By	Payment Type	Check # / Details	Payment Amount
AMTS-ASGME2	25-Oct-2017	Anna-Marie Taves	Check	[none]	\$514.75

▼ Overpayment Details

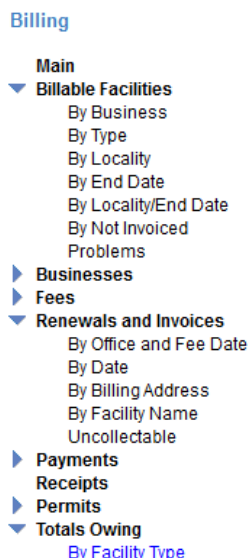
Payment ID	Payment Date	Posted By	Payment Amount	Outstanding
AMTS-ASGME2	25-Oct-2017	Anna-Marie Taves	\$100.00	\$0.00

Batch License Payments

Go to Billing>Totals Owing> to find a few different views to see your licenses and apply payments.

You can sort any of these views by column and you can move the columns around as well.

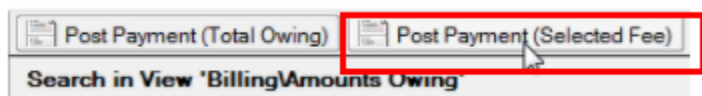
By Facility Type shows the facility and the amount due, so this is a good place to start:



Billing

- Main
 - ▼ Billable Facilities
 - By Business
 - By Type
 - By Locality
 - By End Date
 - By Locality/End Date
 - By Not Invoiced
 - Problems
 - Businesses
 - Fees
 - ▼ Renewals and Invoices
 - By Office and Fee Date
 - By Date
 - By Billing Address
 - By Facility Name
 - Uncollectable
 - Payments
 - Receipts
 - Permits
 - ▼ Totals Owing
 - By Facility Type

Select the licenses you would like to apply payment to and then use the Post Payment (Selected Fee) button at the top to enter check details for each facility:



****This will automatically add the licenses to the Ready to Print view so you can print them as a batch as well****

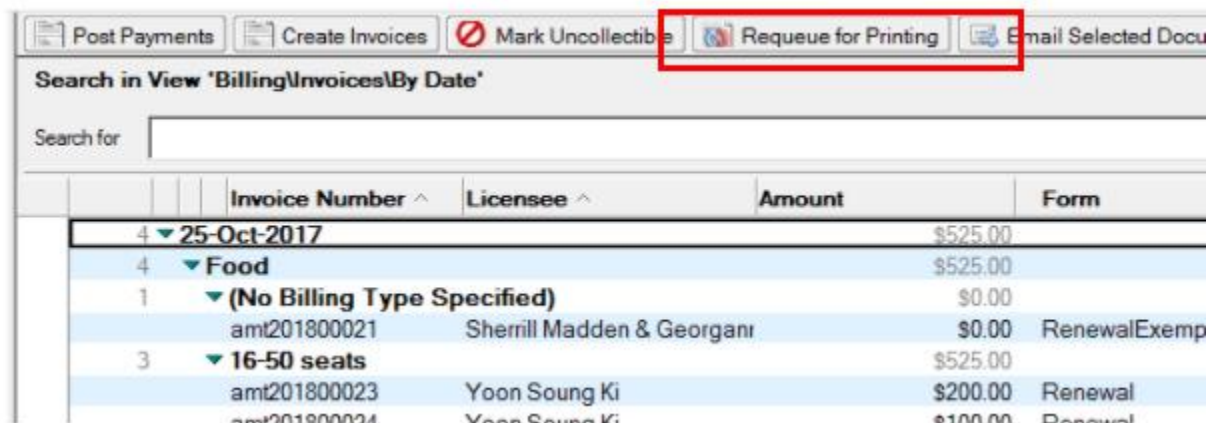
Ready to Print View

This is the best place to batch print renewals, invoices and licenses during the renewals period.

Ready to Print view will automatically clear out records that have been printed.

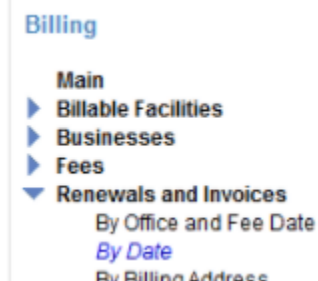
Note: Do NOT delete from this view, only use the De-Queue Selected Documents to remove from this view.

If you have a printer error or something that causes a print error, you can go to Billing>Renewals and Invoices and hit Requeue for Printing to add them back to your Ready to Print view:



If you send information to the printer and something happens at the printer end of things, then it will mark they were printed. When this happens, you will need to requeue the renewals/licenses to get them back into the Ready to Print view.

To do this, go to:



Recheck the facilities and then select the Requeue for Printing button:

HEALTHSPACE
HARMONIZED INTELLIGENCE

Oregon EHS Testing
HS-SWK-DOM1/HealthSpace

Billing

- Main
 - Billable Facilities
 - Businesses
 - Fees
 - Renewals and Invoices
 - By Office and Fee Date
 - By Date
 - By Billing Address
 - By Facility Name
 - Uncollectable
 - Payments
 - Receipts
 - Permits
 - Totals Owing
 - Miscellaneous
 - Configuration
- Ready to Print
- Certification

Post Payments Create Invoices Mark Uncoll

Search in View "Billing\Invoices\By Date"

Search for

	Invoice Number ^	Licensee ^
1222	31-Jan-2018	
1	Food Vending	
1	Vending	
	QUAL201906001	Berenice Ven
1221	Food	
29	Warehouse	
✓	QUAL201905756	Amanda Bom
✓	QUAL201905822	Angela Sherw
✓	QUAL201905966	Anna Horodys
✓	QUAL201905279	Brian Coe
✓	QUAL201905454	Brian Mcgheh
✓	QUAL201905511	Chris Stewart
✓	QUAL201906265	Christopher Ba
✓	QUAL201905366	Coffee Coffee
✓	QUAL201905726	Craig Zumwalt
✓	QUAL201906160	Dave Wagenf
✓	QUAL201906134	Dawn Sellars
✓	QUAL201905572	Francine Austi
✓	QUAL201905750	Gary & Kacey
✓	QUAL201906058	Gerardo Hern

If there are items in the Ready to Print view you don't want to see, then just select them and hit the De-Queue button to remove them from the view. **Do NOT delete them!**

Removing late fees from a license

Before you apply payment to the license, open the child document, go to the Billing box and click the Remove Fee:

Billing

Create Annual Fee Create Specific Fee Create Random Fee Create Renewal Create Invoice Post Payment Regenerate La

Remove Fee Adjusting Entry Print Receipt Remove Payment

▼ **Fee Details**

Fee Type	Fee ID	Fee Date	By	Amount	Paid	Balance
Late Fee (0 d), Permit AMTS -AF66PQ	QUAL-AHYAQL	01-Jan-2017	Quail	\$100.00	\$0.00	\$100.00
Annual Permit-FW	AMTS-AF66PQ	31-Dec-2017	Anna-Marie Taves	\$111.00	\$0.00	\$111.00

▼ **Payment History**

Payment ID	Payment Date	Posted By	Payment Type	Check # / Details
------------	--------------	-----------	--------------	-------------------

▼ **Invoice/Permit Details**

Invoice DOGD201800146 for K's Dogs Gone Coastal - Wh, 28-Jan-2017 for \$211.00

Renewal Notice AMT201700945 for K's Dogs Gone Coastal - Wh, 01-Jan-2017 for \$111.00

Billing Type Warehouse Billing Address Owner Address

Then select all late fees that you would like to remove:

Billing

Create Annual Fee Create Specific Fee Create Random Fee Create Renewal Create Invoice Post Payment

Remove Fee

Remove Fee

Select the unpaid fee that you would like to remove.

OK Cancel

Fee Details

Fee Type

Late Fee (0 d), Per

-AF66PQ

Annual Permit~FW

Payment Hi

Payment ID

Invoice/Per

Invoice DOGD2018

Renewal Notice AM

And say OK. Now apply payment and the permit will be generated and ready to print.

NOTE: Remove late fees, THEN pay the permit fees. You need to do it in this order because the system considers the late fees to be part of the license fee, so they must be removed first.

Also, if the late fees all generate on January 2nd and you wanted them to generate in February instead, you will need to go into the fee configuration docs and correct the number of days in the Late Fee Lenience field. In the example below for a tourist facility, the 15 means that it will generate a late fee on January 15th. Otherwise, HealthSpace will see they are missing add them back for you overnight.

NOTE: Food facilities can assess late fees after the 1st of each month, but **tourist facilities cannot assess the late fees until the 15th of the month** because of differences in their statutes. Keep that in mind when you enter the days in your fee configuration.

Save Done Cancel

UnCheck all Check all

Module

Campground

Food

General

Hotel

Pool

School

Facility Type

Recreational Park

Permit Type

Annual

Billing Type

Recreation Park 101 + Picnic Park

Fee Exempt

1-50 spaces

51-100 spaces

101 + spaces

Fee Details

Fee Code

TR Base Fee

Fee Amount

\$60.00

Fee Exempt

Disable Pro Rating

Late Fee Options

Late Fee Lenience (days)

15

Percentage of Fee Amount

Repeats

Late Fee Percentage

50.00 %

Emailing Inspections

What happens when you email an inspection and it doesn't seem to go when you get back and sync?

Make sure that your Enabled box is Checked for Send Outgoing Mail:

Replication and Sync ▾					
Start Now ▾ Schedule ▾ Options...					
Enabled	High Priority	Application ^	Last Run ▾	Scope	Summary ▾
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Clallam EHS Live	09:37 AM Today		2 Received, 0 Sent (Design: 123 Received, 0 Sent) with Wol/HealthSpace
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import Copy Clallam EHS Live	09:37 AM Today		0 Received, 0 Sent with Eagle/HealthSpace
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Clallam Configuration Center	09:37 AM Today		2 Received, 0 Sent (Design: 2 Received, 0 Sent) with Eagle/HealthSpace
<input checked="" type="checkbox"/>	<input type="checkbox"/>	USPS Zipcodes	09:37 AM Today		1 Received, 0 Sent (Design: 1 Received, 0 Sent) with Dogwood/HealthSpace
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Send outgoing mail			0 Pending, 0 Sent
<input type="checkbox"/>	<input type="checkbox"/>	Application templates (NTFs)			

How to view emailed inspections sent from HS:

This can only be accessed by a system administrator, so your main support staff or supervisor will have this role:

Main Menu>Administration>Reports and Tools>Recent Emails Sent:

Replication and Sync		Workspace X	El Manager X	Marion EHS Live - System ... X
HEALTHSPACE HARMONIZED INTELLIGENCE				
Marion EHS Live (Local)				
Administration				
Filing				
Calendar				
Personal Calendar				
Schedule				
Log Time				
References				
Locked Documents				
User Guide				
Contact HealthSpace Support Forum				
Configuration				
Reports & Tools				
Deleted				
Recent Emails Sent				
Application Data Interface				
		Posted Date ^	Send To ^	
		08/15/2017 10:46:12 AM	kassidy.c.edgington@nordstrom.com	
		08/15/2017 10:45:00 AM	kassidy.c.edgington@nordstrom.com	
		08/15/2017 10:37:44 AM	richardLei6851@gmail.com	
		08/15/2017 10:23:13 AM	ksas930@comcast.net	
		08/15/2017 07:25:00 AM	Ap@daltonmngt.com	
		08/14/2017 05:13:56 PM	Mindyax@hotmail.com	
		08/14/2017 05:05:38 PM	Brinlee5@gmail.com	
		08/14/2017 03:15:11 PM	Gervaisbar@yahoo.com	
		08/14/2017 01:54:21 PM	Muchasgraciascapitol@gmail.com	
		08/14/2017 01:47:06 PM	Fromrussiawithlovecoffee@gmail.com	
		08/14/2017 01:34:16 PM	maryrichardson@brightapartments.com	
		08/14/2017 11:46:47 AM	Battlecreek@affinityproperty.com	
		08/14/2017 10:33:24 AM	Theluvincup@yahoo.com	
		08/14/2017 10:20:54 AM	Raymond.2288@hotmail.com	
		08/12/2017 02:15:17 PM	famara10@comcast.net	
		08/11/2017 04:22:02 PM	Kpoe@realvestcorp.com	
		08/11/2017 03:52:46 PM	Javastopp@gmail.com	
		08/11/2017 03:46:22 PM	Camptaloali@comcast.net	
		08/11/2017 03:37:18 PM	Camptaloali@comcast.net	
		08/11/2017 02:21:04 PM	Mjohnson59@comcast.net	
		08/11/2017 01:26:31 PM	Spdypatg@gmail.com	

If emails do fail to send, you should get a message the following morning that they did not send and you can resolve them from there.

How to automatically send a copy of any emailed inspection to the inspector responsible for the facility:

Those with 'Assigned Inspector' can enter an email of choice in that office/staff document for the messages to be sent to. Or you may want to create a generic email for your office, so all the inspections are sent to a single location.

You can also turn on this feature yourself in System Settings if you have an administrative role (do **NOT** make any other changes to this screen!):

- a) System settings>Inspection Settings>Emailing options
- b) Change the information in Email Inspection (Reply To) box from None to Inspector
- c) Save and you are done!

Which email addresses are used for which parts of the software?

- Inspections—HS uses Phone/Email tab on the facility document
- Billing/Invoices/Permits—HS uses owner info Phone/Email

Best places to enter information in the system

What are the best places to enter info in one place owner/facility/address) so it will properly reflect throughout the facility? And which fields do what throughout the program?

New Parent/location document:

1. You must enter site address for location

Contact Information for Physical Location			
Site Address		Building Contact	
Building #	Direction	Street Name	Type
516		Wallace	Street
Zip Code		City	County
97232		Portland	Multnomah
Country	Directions		
U.S.A.			

But you do not need to enter Building contact information---not really used

2. Then add Licensee/Owner information
 - a. New button:

Licensee/Owner	
<input type="button" value="New"/>	<input type="button" value="Choose Existing"/>
<p>*Choose from the existing Licensees/Owners first. If not listed create a new Licensee/Owner. Please choose an existing Licensee/Owner or create a new Licensee/Owner.</p>	

- b. It will prompt you to enter licensee details, say Yes

View Owner?	
Do you want to enter additional Licensee details?	
<input type="button" value="Yes"/>	<input type="button" value="No"/>

- c. This owner info is what is used for the billing, so it is very important
- d. Enter Primary Contact Last and First and address under contact and Mailing Address tab=main owner's address. **Do not fill in Primary Contact first and last if it is the same information as the licensee otherwise it will show up twice on the license.**

Contact Information for Licensee			
Contact & Mailing Address		Phone / Email	Alternate Mailing
Primary Contact Last		Primary Contact First	
Smith		Bob	
Building #	Direction	Street Name	
Zip Code		City	
Country	DBA or C/O		
U.S.A.			

PO Boxes are special. Enter Type first and then it will let you put in a PO Box number:

The screenshot shows the 'Contact Information for Licensee' section of a form. It includes tabs for 'Contact & Mailing Address', 'Phone / Email', 'Alternate Mailing', 'Emergency', 'Alt Contacts', and 'Misc'. The 'Contact & Mailing Address' tab is active. Fields include 'Primary Contact Last' (Smith), 'Primary Contact First' (Bob), 'P.O. Box', 'City', 'Country' (U.S.A.), and 'DBA or C/O'. A red box highlights the 'Type' dropdown menu, which has 'PO Box' selected.

Only fill in alternate mailing if they want their billing to go to a different address. You don't need to fill out this box otherwise. **The critical tab is Contact & Mailing Address.**

You can enter Owner email/phone as well. **This email will be used for billing emails (renewals/licenses).**

Child/facility document:

Billing should default to Owner Address to mimic how it was set up historically in Phoenix

The screenshot shows the 'Billing Type' and 'Billing Address' dropdown menus. 'Billing Type' is set to '16-50 seats'. 'Billing Address' is set to 'Owner Address', which is highlighted with a red box.

Choose which address to copy for mailing (Physical address or Business/Owner address)

We recommend using Business address for consistency:

The screenshot shows the 'Contact Information For Facility' section. It has tabs for 'Facility Location', 'Mailing Address', 'Billing Address', 'Phone / Email', and 'Additional Contacts'. The 'Billing Address' tab is active. Below the tabs are two buttons: 'Copy Physical Address' and 'Copy Business Address'. The 'Copy Business Address' button is highlighted with a red box.

Facility email address entered here will tie to correspondence and inspections:

The screenshot shows the 'Contact Information For Facility' section. It has tabs for 'Facility Location', 'Mailing Address', 'Billing Address', 'Phone / Email', and 'Additional Contacts'. The 'Billing Address' tab is active. Below the tabs are two buttons: 'Copy Physical Address' and 'Copy Business Address'. The 'Copy Business Address' button is highlighted with a red box.