BCD Minor Label Program – Jurisdiction User Guide

www.minorlabels.info

Located in the upper right-hand corner of each screen are links for Main Menu, Log Out, and Help. To quickly move from one area of the site to another, click on Main Menu.

Search the minor label database. This search feature (only visible when logged out of the system) displays general information about the installation connected with a specific minor label number. This link also allows a homeowner/business to enter a minor label number and view installation information. This could be helpful to a new homeowner who is curious about what work has been performed and by whom. Because this link is available to the public, the address and contact information for the homeowner/business are not visible.

Minor label program information. This links to the information page containing an overview of the program and scope of work allowed.
Activation. The Minor Label Program Administrator sets up jurisdiction accounts. This area is for contractors to set up their accounts and is not applicable for jurisdictions.

The information on the Log In screen for “Activate Your Account” and “Register” is for contractors only.

Log in. Enter the User ID and temporary Password you received by email when the Minor Label Program Administrator activated your account. You will then be logged in to the Main Menu. The first step is to change your password by clicking on Change your password located at the bottom of the Main Menu page.

- Click Change your password
- Enter the temporary Password you received in the automated email
- Enter your new Password (case sensitive)
- Verify the new Password
- Click Save

You will be returned to the Main Menu and a message will display at the top of the page that your new Password has been saved. The next time you log in to the system, you will use the new Password.

Forget your password? On the Log In page, enter either your User ID, or email address, in the “Forgot Your Username or Password” field and then check your email for instructions.

Login - Main Menu

Inspection status tracking report. This is where you will retrieve new inspections requested by BCD and can also view the list of inspections that have been assigned to your inspectors.

- If there is more than one page of inspection requests, numbered boxes will appear at the top and bottom of the list for scrolling between pages. Click on the numbered boxes to move from page to page.
- The inspection list is sorted by date, oldest request date to newest.

If the business/homeowner's mailing address is different from the address where the work was performed, the mailing address for the contact person/business will be visible on the inspection request screen (Owner Address).

BCD Requested: Clicking on any of the BCD Requested label numbers (hyperlinks) takes you to the **Inspection assignment and results data entry** screen, displaying the contractor's contact information and the installation details. Using the print feature on your browser, a paper copy of the inspection request may be printed and given to the inspector (if this is your organization's procedure).

1. Inspection Comments: The comments box has several uses:
   - If the contractor has specific information to be relayed to the inspector, it will appear in this box.
   - This box also serves as the "tracking log" that appeared on the old inspection request sheets. Attempts to reach the homeowner/business to set up an inspection will be entered in this box. For example, *11/7/07 – left voicemail* or *11/7/07 – mailed letter, response due 11/17/07.* After typing the note click Save—the system will take you to the View inspection status tracking report screen. The note just entered will now appear beneath the label number. This is an easy way to keep track of the status of each contact attempt.
   - No Contact/Owner Denied results **do not** get reported to the contractor—they will never see the comments entered in this box.
   - Pass/Fail results **do** get reported to the contractor and they will see anything entered in the comments box. **THE REASON(S) FOR WHY A MINOR LABEL FAILED MUST BE ENTERED IN THE COMMENT BOX** (OAR 918-098-1900).
2. Job Address: This is the location where the work was performed. The address is also a hyperlink to Yahoo Maps, displaying the location of the property. (A quick way for an inspector to view the location of the property and receive/print driving directions.)
3. Inspection Status: The choices in this drop-down box are: Assigned to Inspector, Fail, No Contact, Owner Denied, and Pass.
   - **Work in Process:** When BCD requests an inspection, the inspection will arrive marked "BCD Requested." It the status of the label is still marked "BCD Requested" after two months, the inspection will **Expire** and be returned to BCD. To prevent this, the status can be changed to "Work in Process" while the label is being worked; e.g., contacting the homeowner to schedule an appointment.
   - **Assigned to Inspector:** Once an appointment has been made with the homeowner or business and the job is ready to be inspected, the inspection status should be changed to "Assigned to Inspector". **Leave the inspection date blank** and click Save.
   - **No Contact/Owner Denied:** If the contact attempts result in either No Contact or Owner Denied, click the drop-down menu and select the appropriate result. **Leave the inspection date blank** and click Save. You will be returned to the View inspection status tracking record and this label is now gone from the list.

- **Pass/Fail:** Once the inspection is completed; enter the results, select "Pass" or "Fail" from the Inspection Status drop-down menu. If the inspection fails you must include the reason for the failure.

3. Inspection Date: A date is entered **only** for **Pass** and **Fail** inspections. When selecting **Work in Process, Assigned to Inspector, No Contact,** or **Owner Denied,** the Inspection Date field **should be left blank,** and the system will automatically enter the last date the label was modified.
4. Save: Failure to press Save after altering the status of a label will bring up the prompt "You are about to discard any changes you have made to this screen." Changes can always be discarded by pressing **Cancel.** Clicking Save will return you to the View inspection status tracking report screen.

Inspection history. Labels of all status types appear in the inspection history—those being worked and those already closed. Inspection results can be entered from here as well. Begin by clicking on the label number whose status you wish to change. On the bottom right-hand side of the label detail screen, under Comments, is a green and blue icon. Clicking on this icon will take you to the Inspection assignment and results data entry screen where inspection results can be entered. This is the second area of the website where inspection results can be entered.

The history for any single label can be accessed from this screen as well. In the upper right-hand corner of the screen is a link for search by label number. Clicking on this link will bring up the **Find a label** screen. Select either Electrical or Plumbing from the Label Type drop-down menu (or enter either the letter "e" or "p"), hit TAB or use the mouse to move to the Label ID box, and then enter the label number with the letter "s" in front of the label number. Any information that has been provided for this label by the contractor will appear on this screen, including inspection results if applicable (even if the inspection was performed by a different jurisdiction).

Enter inspection results. The third and final place where inspection results can be entered is using the Enter inspection results link. This link is used only if you already know the label number, or for entering **unrequested inspections** (discussed in the Procedural Information section of the Guide). Select either Electrical or Plumbing from the Label Type drop-down menu (or enter either the letter "e" or "p"), hit TAB or use the mouse to move to the Label ID box, and then enter the label number with the letter "s" in front of the label number.

If the installation information has been entered: The resulting screen will be the "Label details" screen with the green and blue icon appearing under "Comments." Click on the icon to enter inspection results at the Inspection assignment and results data entry screen.

If the installation information has NOT been entered or there is an "unknown" address: The only time inspection results will be entered using this screen, under this specific circumstance, will be for **unrequested inspections** (see the section on Unrequested Inspections).

Reports. The "Quarterly" report and the "All Inspections" report can be viewed using this link. Inspection results appear on the report as soon as their status is changed from BCD requested or assigned to inspector to either pass, fail, no contact, or owner denied.

- Click on the report link to open the report window
- Select the Quarter you wish to view and/or print
- Select either Reimbursable (the Quarterly) or All Inspections (this report includes all results—no contact/owner denied, as well as the reimbursable inspections)
- Select the viewing format: Standard Web display, PDF file, or Excel spreadsheet
- The resulting display can be saved and/or printed.

Search the minor label database. This is the same screen as the one that appears on the Welcome to the Minor Label Program screen. It displays minimal label information. Full inspection information for any minor label may be retrieved by clicking on View inspection history, then search by label number (located in the upper right-hand corner of the screen).

Update jurisdiction information. This section contains information provided to the Minor Label Program by the primary user. Please be sure to update this section if your contact information should change.

Manage user account accesses. This user will have the ability to set up account access for others in the organization. There is no limit as to how many users can be on an account, but each user must have a unique email address. Before beginning, the primary user will need to know the email address of additional users. Clicking on Manage user account accesses will display the active user list. To add additional users:

- Click Add a new proxy user
- Create a User ID for the new user (the Minor Label Program is setting up User IDs as lowercase, using the first six (6) letters of the person's last name and the first letter of their first name)
- Fill in the rest of the blanks with the user's information
- Click on the access level checkboxes relevant for the new user. (Access levels can be changed at any time by clicking on the green and blue icon to the right of the user's email address. This procedure is discussed in more detail below.)
- Click Save

An email will be generated to the new user providing their temporary password. The new user should immediately log in to the system and change the automated password to one they can remember (see Step #1).

To the right of each user's email address under "Actions" are two icons; clicking on Edit displays the user's:

- user ID
- contact information
- access settings (the primary user can check/uncheck access levels for other users)

If an employee should leave your organization, click on the green and blue Edit button to the right of their email address and uncheck their access level boxes. Click Save. This user will now appear at the bottom of the list under "Inactive Users." To reactivate a user, click on the Edit button next to their name and mark the access level checkboxes. This user will now reappear in the active user list.

Access levels:

- Enter Inspection Info: Users with this level checked will have the ability to mark an inspection Pass/Fail/No contact/Owner denied.
- Receive Automated Emails: Users with this level checked will automatically receive notification that BCD has requested an inspection. It is important to make sure someone other than the primary user has this box checked for times when the primary user is not in the office to handle inspection requests.
- User Management: Users with this level checked will be able to add/remove other users on the account.