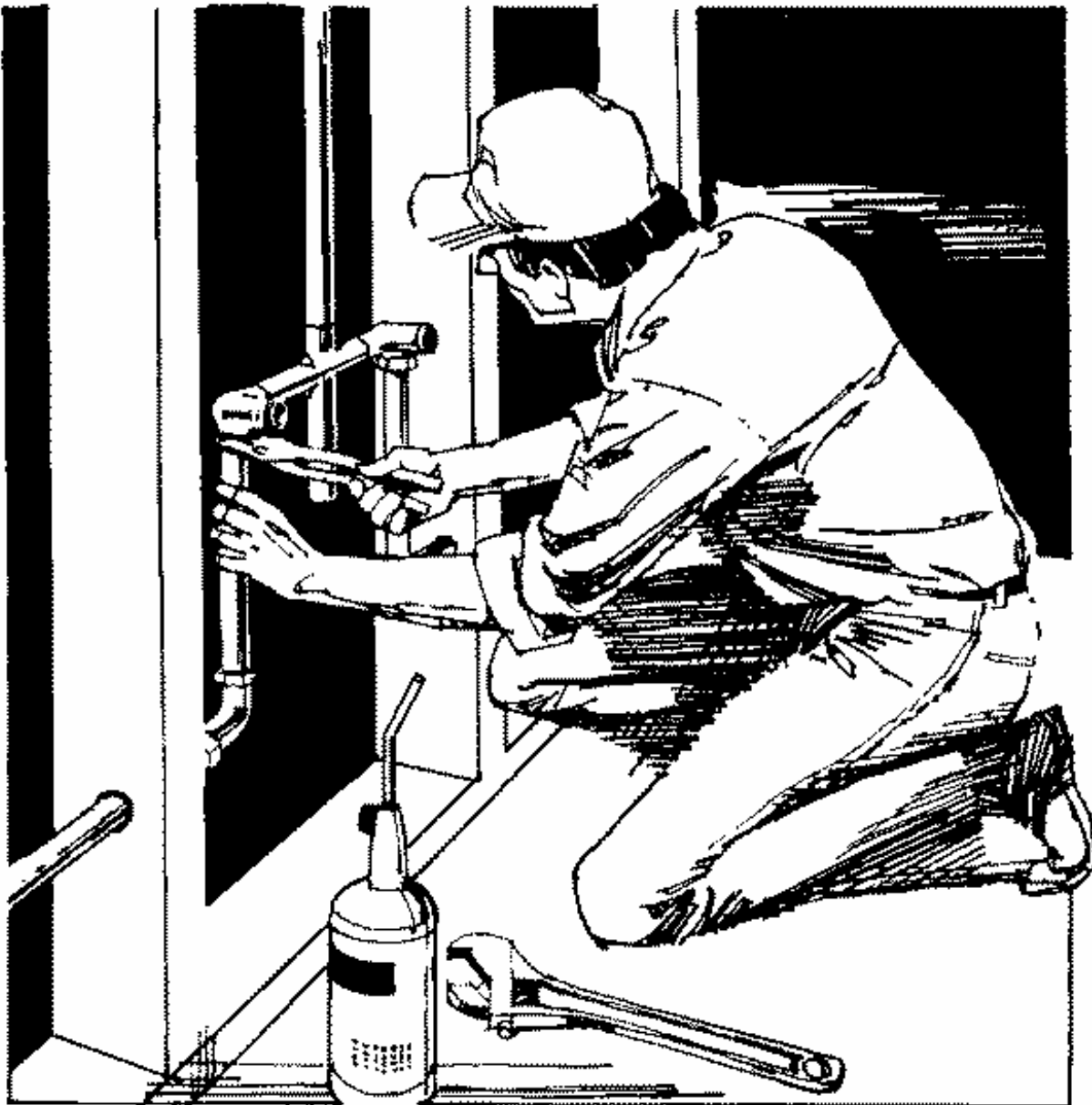


Plumbing – Contractors/Installers



User's Manual

Plumbing - Contractors

Health District Information System

HDIS (Windows Ver. 4.0)

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Health District Information Systems
helpdesk@hdis.org

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Introduction

This program is designed to assist you in organizing a systematic approach to entering your contractors/installers and provides accurate up-to-date records within your health district.

Please review the manual carefully to obtain the maximum benefits. **Little or no prior computer experience is necessary to operate this program.**

About This Manual

The Contractors/Installers Module is simple to use. ***The maximum benefit with the least time spent will be obtained if you start at the first page of this manual and follow the directions exactly as you enter the first record in your computer.***

Square boxes in this manual surround the key you are to press on your keyboard. As an example, when you read ,

ENTER

press the **enter** key on your keyboard.


The word **TYPE** is followed by bracketed [] instructions of what to type into a field.

Note: **For Technical Support, email: helpdesk@hdis.org**



Navigation

Whenever you see one  click the left side of your mouse once.

Whenever you see two  click the left side of your mouse twice.

Navigation Keys For Entering Information

Tab or **ENTER** to move to next field

Shift **Tab** or **Up** to go back one field

Alt + **R** places you in the receipt screen.

Editing Keys

Backspace deletes one character left of cursor

Delete deletes one character

Insert inserting & overwriting modes

When you see a pull-down field, click the arrow to the right to view all your choices.



Starting HDIS

MICROSOFT Windows Users

Start

Programs

Health District Info Systems

HDIS

Health District Information System Menu Bar

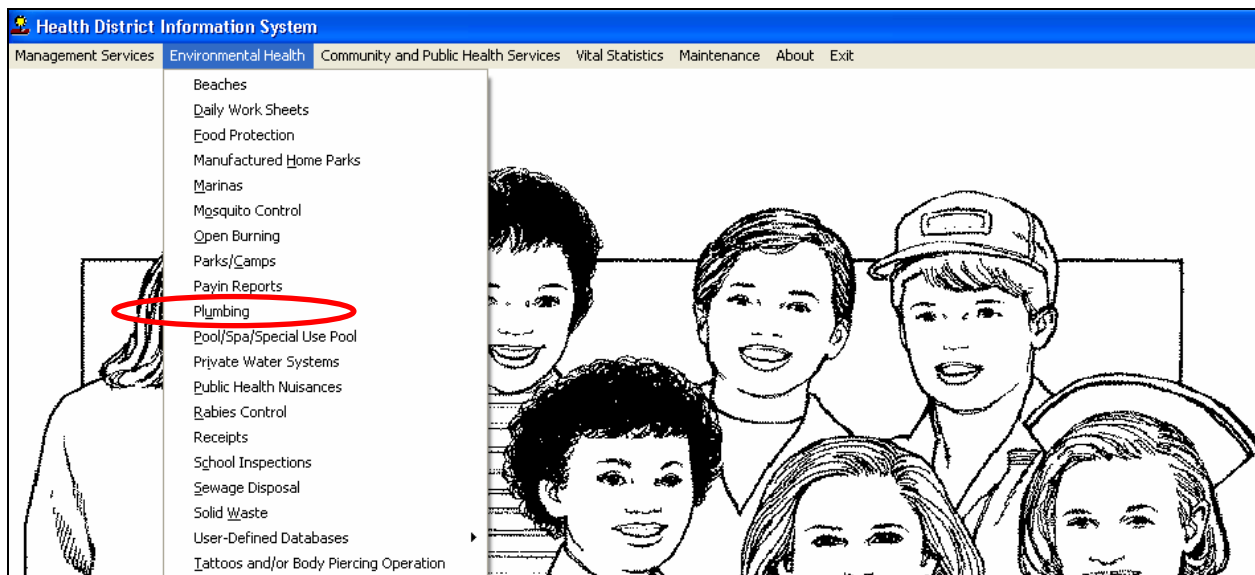
HDIS (Health District Information System) has several different modules designed to assist your health district in its day-to-day operations. The **Contractors/Installers Module** is a great addition to these modules and simplifies your record keeping, billing and information management needs.



Select Environmental Health



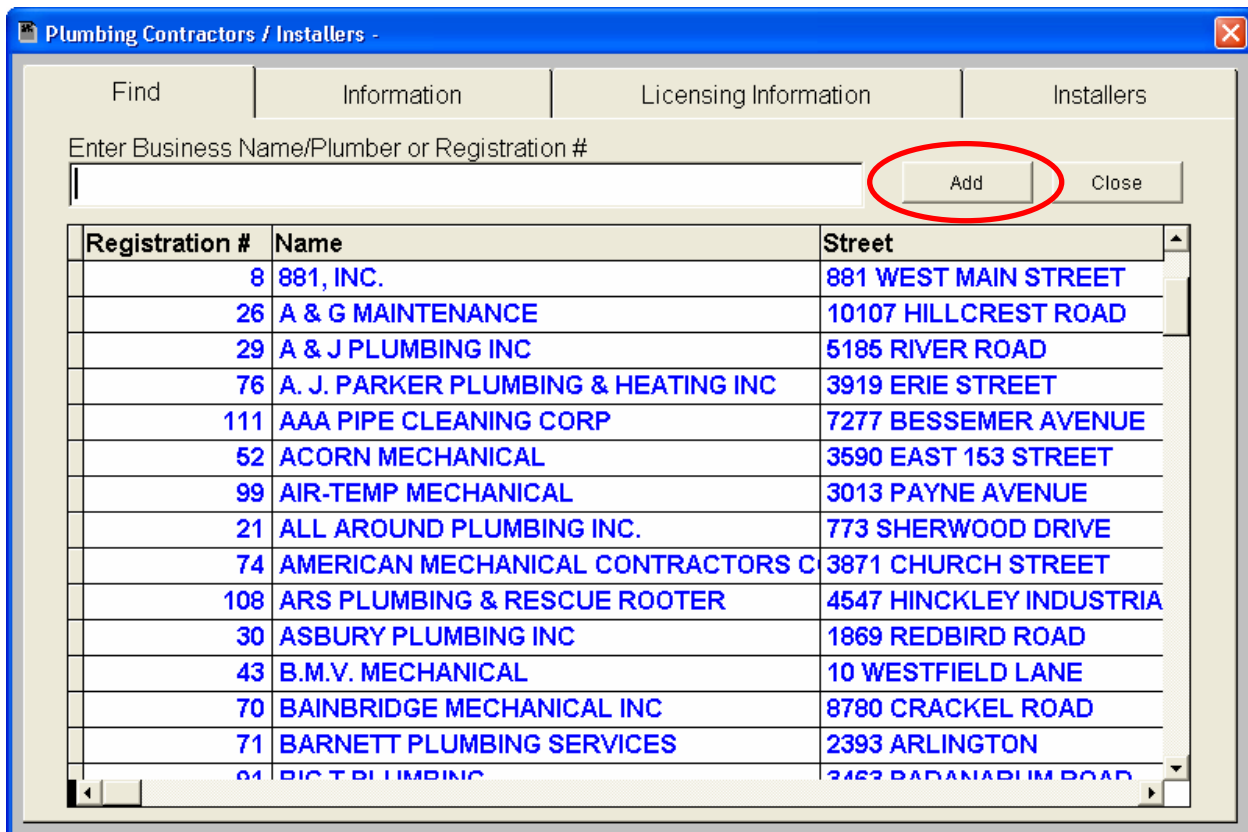
Select Plumbing



Select Contractors/Installers



Entering a Contractor



The **FIND** tab on the Contractors window is for locating a contractor. You can browse through the grid to find a name or type the name in the **Enter Business Name/Plumber or Registration #** field and then press the “**enter**” key on your keyboard.

To add a Contractor to your list, click the **Add** button.
Once the contractor is entered, you will not have to click the **Add** button.

Plumbing Contractors / Installers - ACORN MECHANICAL

Find Information Licensing Information Installers

Application for Registration to Install Plumbing

Registration # Business Name/Plumbing Installer

Street City State

Zip code Phone Cell Phone Pager Backflow Technician

Years Bonded(Y/N)? Bond Company Bond Expires

Name of Contractor/Plumbing Installer Street address

City State Zip code Phone

You may now begin to enter information into the fields. Remember, you can use the “**Tab**” or the “**Enter**” key to advance from field to field. On this page, you will fill out the information for the business and the installer.

If your health department charges each individual installer, you will add each installer on this page. If your health department charges one flat rate for each contractor, you will be able to list the installers under the “**Installer**” tab.

** Note: **All phone numbers must start with a “1”**

Licensing Information



Licensing Information

Plumbing Contractors / Installers - ACORN MECHANICAL

Find	Information	Licensing Information	Installers
Code 1	Descript PLUMBING INSTALLER COMMERCIAL PERMIT F	Local fee 90.00	Date issued 12/13/2005
Date paid 12/13/2005	Receipt# 13171	Political subdivision OUT OF COUNTY	
Note 			
<input type="checkbox"/> Out of business OOB date //			
			<input type="button" value="Print"/> <input type="button" value="Modify"/>

On this page you will enter the licensing information for the contractor.

Field/Button	Description
Code	Choose the fee code for the contractor
Descript	(filled out once fee code is selected)
Local Fee	(filled out once fee code is selected)
Date Issued	Enter the date the permit was issued.
Date Paid	Enter the date the permit was paid.
Receipt #	Enter the receipt number for the permit. If you have the Receipts module, press Alt R to print a receipt.
Political Subdivision	Choose the political subdivision.
Note	Enter your notes on the contractor.
Out of Business	Check if the contractor is out of business
OOB Date	Enter the out of business date.
Print	Opens the print menu.
Modify	Click to modify the information on the page.

Print Button



Print

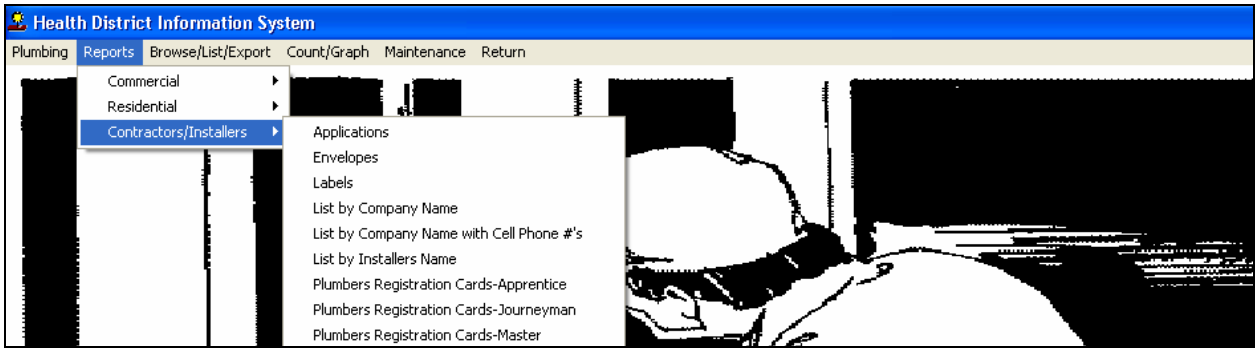
Print: The “Print” button is available on all the tabs.

Field/Button	Description
Application	Prints an application form.
Application year	Specify the year you want the application printed.
Registration	Prints a registration form.
Registration year	Specify the year you want the registration printed.
Business Name Envelope	Prints an envelope addressed to the business name.
Contractor's Name Envelope	Prints an envelope addressed to the contractor.
Registration Card - Apprentice	Prints an apprentice registration card.
Registration Card - Journeyman	Prints a journeyman's registration card.
Registration Card - Master	Prints a master's registration card.
# Cards to Skip	Skips used cards on sheet labels already printed.
Preview	Previews the printout.
Print	Prints the form.
OK	Prints/previews the form.
Close	Closes the print menu.

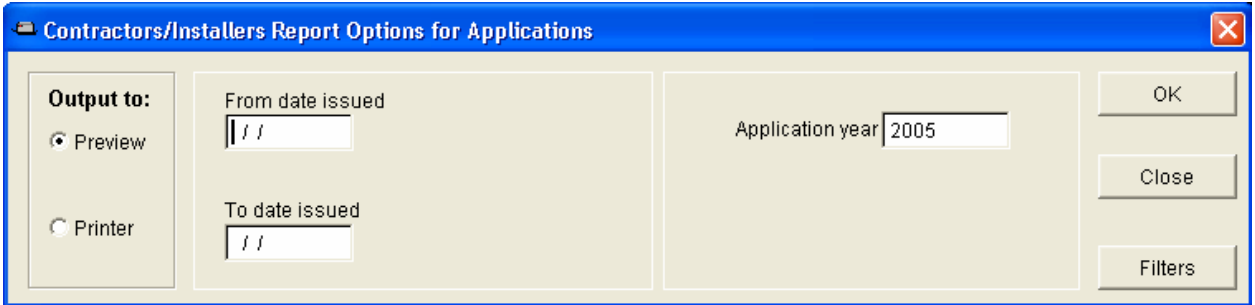
Reports



Reports



The **Contractors** module has a set of pre-defined reports from which to choose. Each report will ask for **From date issued** and **To date issued**. This is to prevent printing a report for a contractor that is Out of Business.



You may preview the report before printing. Also, you have the ability to use filters to build a query.

Reports

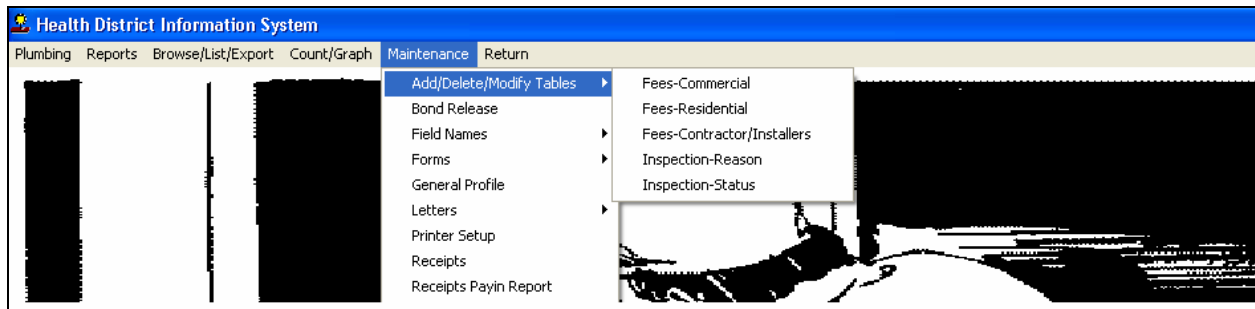
Report	Description
Applications	Generates applications for each contractor that meets the criteria set in the "from date" and "to date" issued.
Envelopes	Addresses envelope to each contractor that meets the criteria set in the "from date" and "to date" issued.
Labels	Generates mailing labels for the contractor that meets the criteria set in the "from date" and "to date" issued.
Labels - Licensee	Generates mailing labels to the licensee of the contractor that meets the criteria set in the "from date" and "to date" issued.
List by Company Name	Generates a list of contractor names that meets the criteria set in the "from date" and "to date" issued.
Lists by Company Name with Cell Phone #'s	Generates a list of contractor names with the cell phone numbers of each installer that meets the criteria set in the "from date" and "to date" issued.

Plumbers Registration Cards – Apprentice	Print registration cards in Bulk by using Date Issued. Use the Filter button to select Apprentice records.
Plumbers Registration Cards – Journeyman	Print registration cards in Bulk by using Date Issued. Use the Filter button to select Journeyman records
Plumbers Registration Cards - Master	Print registration cards in Bulk by using Date Issued. Use the Filter button to select Master records.

Maintenance - Add/Delete/Modify Tables



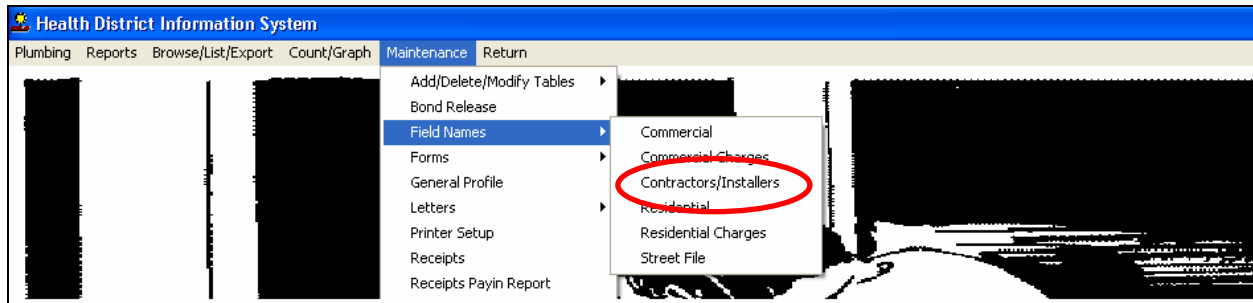
Maintenance



The maintenance menu contains a list of the tables that you can modify.



Field Names – Contractors/Installers

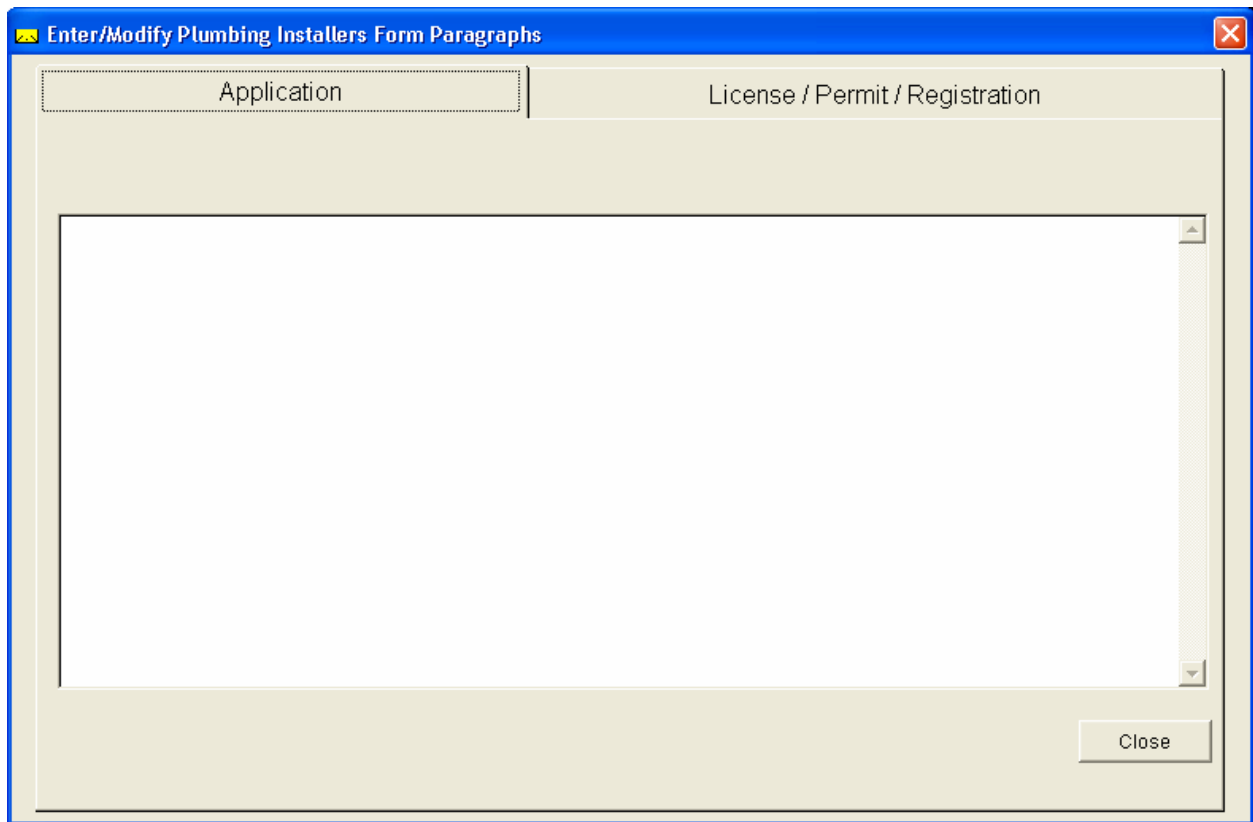
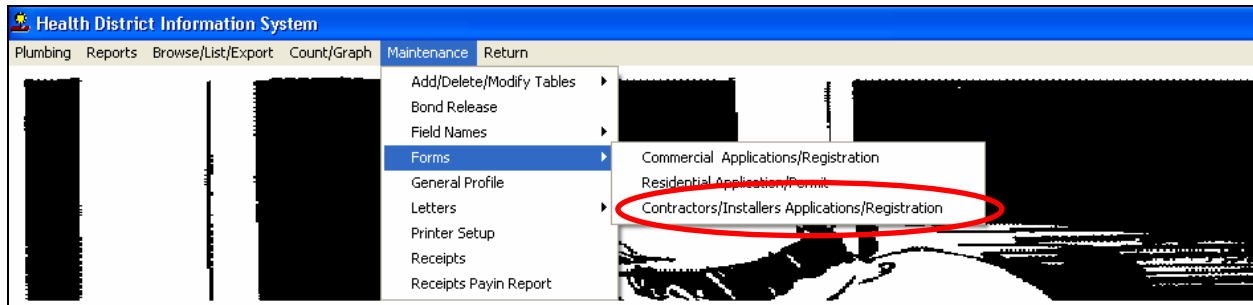


Field Name	Data Base Field Name
▶ APPLICANT CITY	PLC.MAIL_CITY
APPLICANT PHONE	PLC.MAIL_PHONE
APPLICANT STATE	PLC.MAIL_STATE
APPLICANT STREET	PLC.MAIL_ST
APPLICANT ZIP	PLC.MAIL_ZIP
BACKFLOW TECHNICIAN	PLC.BACK_TECH
BOND COMPANY	PLC.BOND_NAME
BONDED ?	PLC.BONDED
BUSINESS NAME	PLC.NAME
CELL PHONE	PLC.CELL_PHONE
CITY	PLC.CITY
DATE EXPIRES	PLC.BOND_DATE
DATE ISSUED	PLC.DATE_ISS
DATE PAID	PLC.DATE_PAID
FEE CODE	PLC.FEECC
FEE DESCRIPTION	PLC.DESCRPT
LICENSE #	PLC.ID
LOCAL FEE	PLC.FEE_LOCAL
NAME OF APPLICANT	PLC.OPER_NAME
NAME OF APPLICANT	PLC.MAIL_NAME
NOTE	PLC.NOTE
OOB	PLC.OOB
OOB DATE	PLC.OOB_DATE

The **field names** listing can be very useful in determining what fields you wish to utilize to merge data for letters or when creating adhoc reports. The Field Name column is used to merge data into letters. Enter the field name in capital letters in the body of the letter surrounded by asterisks (no spaces between asterisks and field name).



Forms – Contractors/Installers Applications/Registration



You are able to enter additional information to your application on registration forms for your contractors. This information will appear on **EVERY** application and registration printout.



General Profile

General Profile [Close]

Demographics | General | Management | Environmental | Community & Public Health Services | Vital

Health Department

Division

Address1

Address2

City State Zip

County

Phone #'s FAX #

Federal Tax ID

Commissioner

Client/Server Location

2004 2003 2002 2001 2000 1999 1998

Make Checks Payable to:

Close

The **General Profile** enables you to fill out the basic information for your health department.



General

General Profile

Demographics | **General** | Management | Environmental | Community & Public Health Services | Vital

Activate Pull-Downs

Default to Profile Area Code

Amount Per Mile

Display Odometer Readings for Daily Work Sheets

Name of Signature File

Export / Import Server Location

This is a Lap Top for Export / Import Function

PC Tablet

Memory Problem - "Not Responding"

Environmental / Use Street Name Table

Options for Printing Letters

Letters-1/4 inches from top

Letters - 1 3/4" left margin

Letters - 2" left margin

Letters - 2 1/4" left margin

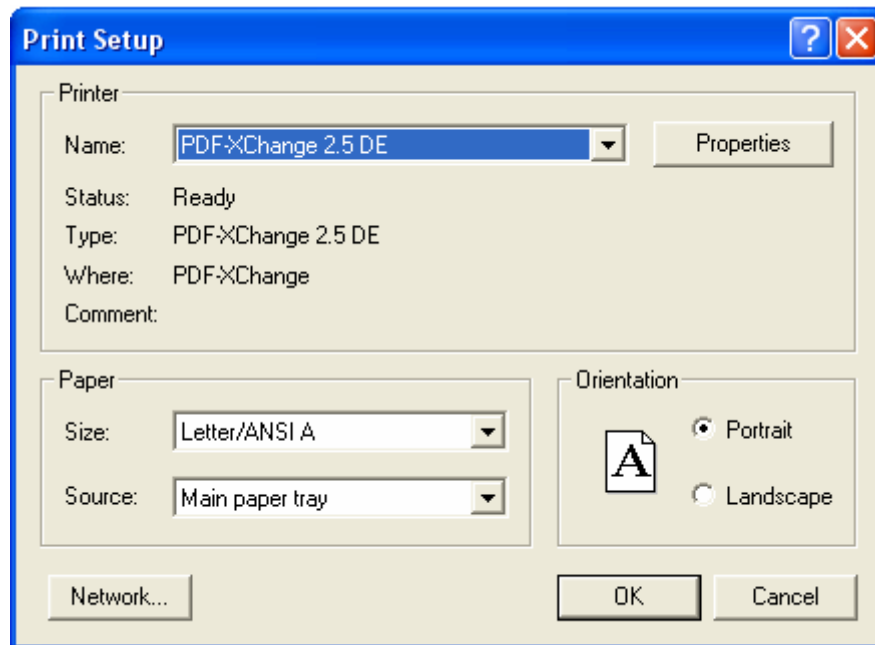
Letters - 2 1/2" left margin

Field/Button	Description
Activate Pull-Downs	Activates the "pull down" menus in HDIS
Default to Profile Area Code	Defaults every phone number area code to the area code entered in the "General Profile" on the "Demographics" page.
Amount Per Mile	Enter the amount of money received per mile for personal vehicle usage.
Display Odometer Readings for Daily Work Sheets	Allows you to enter mileage using odometer readings for your Daily Work Sheets.
Name of Signature File	
Export/Import Server Location	
This is a Lap Top for Export/Import Function	Check if the PC is being used out in the field.
Memory Problem – "Not Responding"	
Environmental/Use Street Table	

Letters – ¼ Inches from Top	Choose how many lines you would like to move your letter down from the top of the paper.
Letters – 1 ¾" left margin	Check to begin printing your letters 1 ¾" left of the margin.
Letters – 2" left margin	Check to begin printing your letters 2" left of the margin.
Letters – 2 ¼" left margin	Check to begin printing your letters 2 ¼" left of the margin.
Letters – 2 ½" left margin	Check to begin printing your letters 2 ½" left of the margin.



Printer Setup



The print setup allows you to choose from which printer you wish to print. Pick the printer in the name dropdown and click **OK**.



Receipts Pay In Report

Print Pay In or Receipt [Close]

From Date: 12/12/2005 To Date: 12/12/2005

Pay In by Receipt Book
[Dropdown menu]

Pay in by Fund

Pay in by Initials

Receipt

Output to:

Preview
 Print

OK
Close

If your health department has the **“Receipts”** module, you have the ability to print your pay in reports through the **“Maintenance”** tab.

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