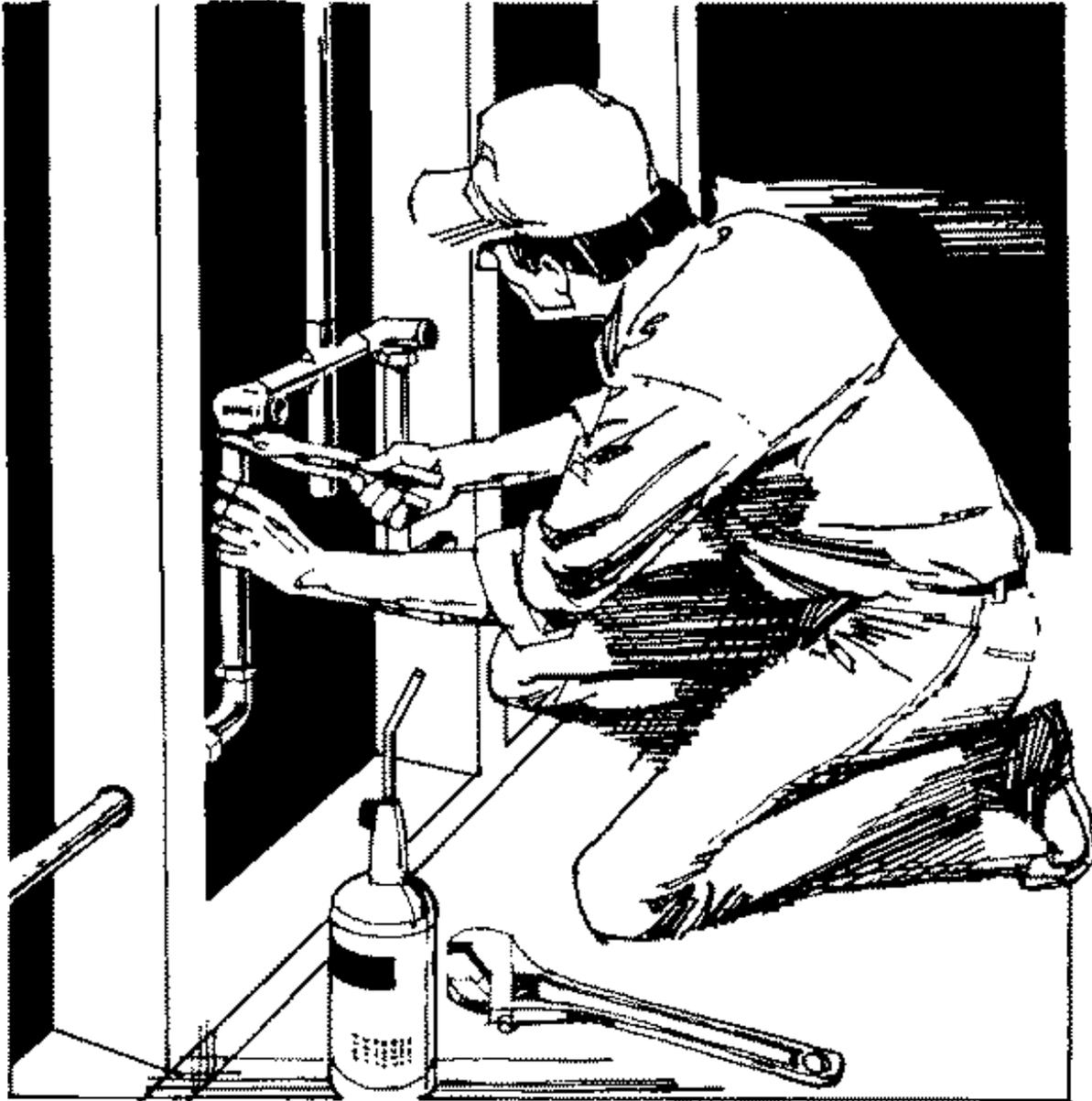


Plumbing - Commercial



User's Manual

Plumbing - Contractors

Health District Information System
HDIS (Windows Ver. 4.0)

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CHC Software, Inc.
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 commercial plumbing locations 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 Commercial Plumbing 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

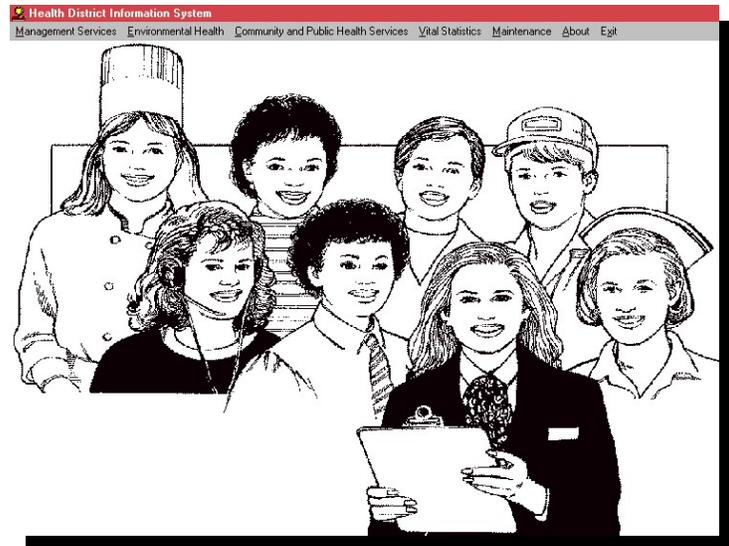
Programs

Health District Info Systems

HDIS

Health District Information System Menu Bar

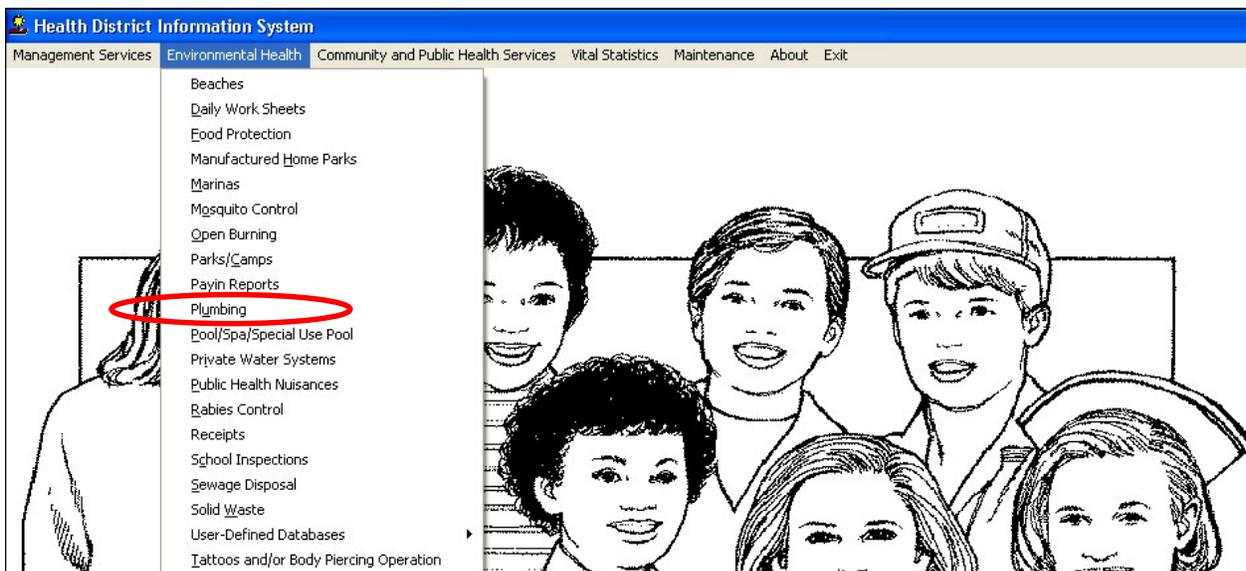
HDIS (Health District Information System) has several different modules designed to assist your health district in its day-to-day operations. The **Commercial Plumbing Module** is a great addition to these modules and simplifies your record keeping, billing and information management needs.



Select Environmental Health



Select Plumbing



Select Commercial



Entering a Commercial Plumbing Location

Commercial Plumbing Location -

Find | Location/Owner | Plumbing Permit | Information | Inspections | Comments | GIS/GPS

by Building by Street by Owner by Permit by ID #

Type find information and press enter

Building Name	Street	City
(CHINA GARDENS) MR. WONG REST.	29935 EUCLID AVENUE	WICKLIFFE
10 PALMER PLACE	10 PALMER STREET	PAINESVILLE TWP.
1920 PARK AVE.	70 MAIN ST.	
2-M MANUFACTURER	1747 JOSEPH LLOYD PKWY	
A BIT OF EUROPE	29311 EUCLID AVE.	WICKLIFFE
A LITTLE CAFE	35003 VINE ST.	
A PIECE OF PARADISE	32929 VINE ST.	
A TOUCH OF HOME	9847 JOHNNYCAKE	
A-1 CHIMNEY SWEEPS	4007 N. RIDGE RD.	
A-1 ELECTRIC	1884 E. 337TH ST.	
A-ACTION	36470 BILTMORE	

The **"FIND"** tab on the Commercial Plumbing window is for locating a commercial plumbing location. You can browse through the grid to find a name or type the name in the **"Type find information and press enter"** field. You may also locate by street, owner, permit or ID# by clicking the proper radio button.

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

Commercial Plumbing Location - 34100 VINE STREET Building Name: DISCOUNT DRUG MART

Find Location/Owner Plumbing Permit Information Inspections Comments GIS/GPS

ID # 2300012 Name of Business(if applicable) DISCOUNT DRUG MART

Street 34100 VINE STREET City EASTLAKE State OH Zip 44095

Building New/Old (N/O) 0 Used for DRUG STORE # of stories 1 Semi-Public Sewage N (Y/N)

Water Supply CWS (P)ivate, (C)ommunity or (I)ndividual Political Subdivision

Owner's Name DISCOUNT DRUG MART Street

City State Zip Phone - - -

Previous Next Delete Add Modify

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 location and owner.

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

Refresh Charges	Click to list the charges in the grid by chronological order.
Next Available Permit #	This will automatically find the next available Permit #
Print	Opens the print menu.
Modify	Click to modify the information on the page.

“Total # of Fixtures” is computed by counting the quantity entered for each charge line. It will ignore the quantity for any description with the word “PERMIT” or “INSPECTION” in it. This allows you to enter descriptions of your choice.



Add Charge

Commercial Plumbing Location - 34100 VINE STREET Building Name: DISCOUNT DRUG MART

Find | Location/Owner | Plumbing Permit | Information | Inspections | Comments | GIS/GPS

Plumbing Permit # 2300012 Date Issued 01/29/2003 Date paid 01/29/2003 Receipt# 13091 Extention Date //

Code Description Fee Quantity Total Fee
FIX FIXTURES 12.00 4 12.00 Add Charge

Date	Permit #	Code	Descript	Cost	Quantity	Total	Paid	Date Paid
01/29/2003	2300012	PER	PLUMBING PERMIT	90.00	1	90.00	<input type="checkbox"/>	//

Delete Charge

Refresh Charges

Total # of Fixtures 0

Total Fee 90.00

Next Available Permit # Print Modify

The charge was added to the grid and the total fee field has been updated for the current charge. You can now add more charges to the grid for the permit.

Once the permit has been paid, you can mark in the grid that it was paid, the date paid, and the receipt number.

Information



Information

Commercial Plumbing Location - 34100 VINE STREET **Building Name: DISCOUNT DRUG MART**

Find | Location/Owner | Plumbing Permit | **Information** | Inspections | Comments | GIS/GPS

Plumbing Contractor: METRO PLUMBING, INC. | Plumbing Installer: []

Underground Inspection Date: [//] | Waste & Vents/Backflow Inspection Date: [//]

Rough-in Approval Date: [//] | Final Inspection Date: [//] Final Never Completed

Inspector: [BW] | WILLIAMS, BRIAN | Service: [R] | ROUTINE

Print Modify

On this page you will enter some of the basic information on the inspection.

**** Note:** The Plumbing Contractor will appear in red if the contractor is not registered for the current year.

Field/Button	Description
Plumbing Contractor	Choose the plumbing contractor.
Plumbing Installer	Choose the plumbing installer (optional)
Underground Inspection Date	Enter the underground inspection date.
Waste & Vents Backflow Inspection Date	Enter the waste and vents/backflow inspection date.
Rough-in Approval Date	Enter the rough-in approval date.
Final Inspection Date	Enter the final inspection date.
Final Never Completed	Check if the final inspection date was never completed.
Inspector	Choose the inspector.
Service	Choose the service the inspector performed.
Print	Opens the print menu.
Modify	Click to modify the information on the page.

Inspections



Inspections

Commercial Plumbing Location - 34100 VINE STREET Building Name: DISCOUNT DRUG MART

Find | Location/Owner | Plumbing Permit | Information | **Inspections** | Comments | GIS/GPS

Inspection Date: 11 Plumbing Permit # Inspector Reason Status

Memo

Next Previous Delete **Add** Modify

The inspection tab is for adding your inspection records for the location. To add an inspection, click the **Add** button.



Inspections

Commercial Plumbing Location - 34100 VINE STREET Building Name: DISCOUNT DRUG MART

Find | Location/Owner | Plumbing Permit | Information | **Inspections** | Comments | GIS/GPS

Inspection Date: 12/12/2005 Plumbing Permit #: 2300012 Inspector: BW WILLIAMS, BRIAN

Reason: FINAL INSPECTION Status: APPROVED

Memo

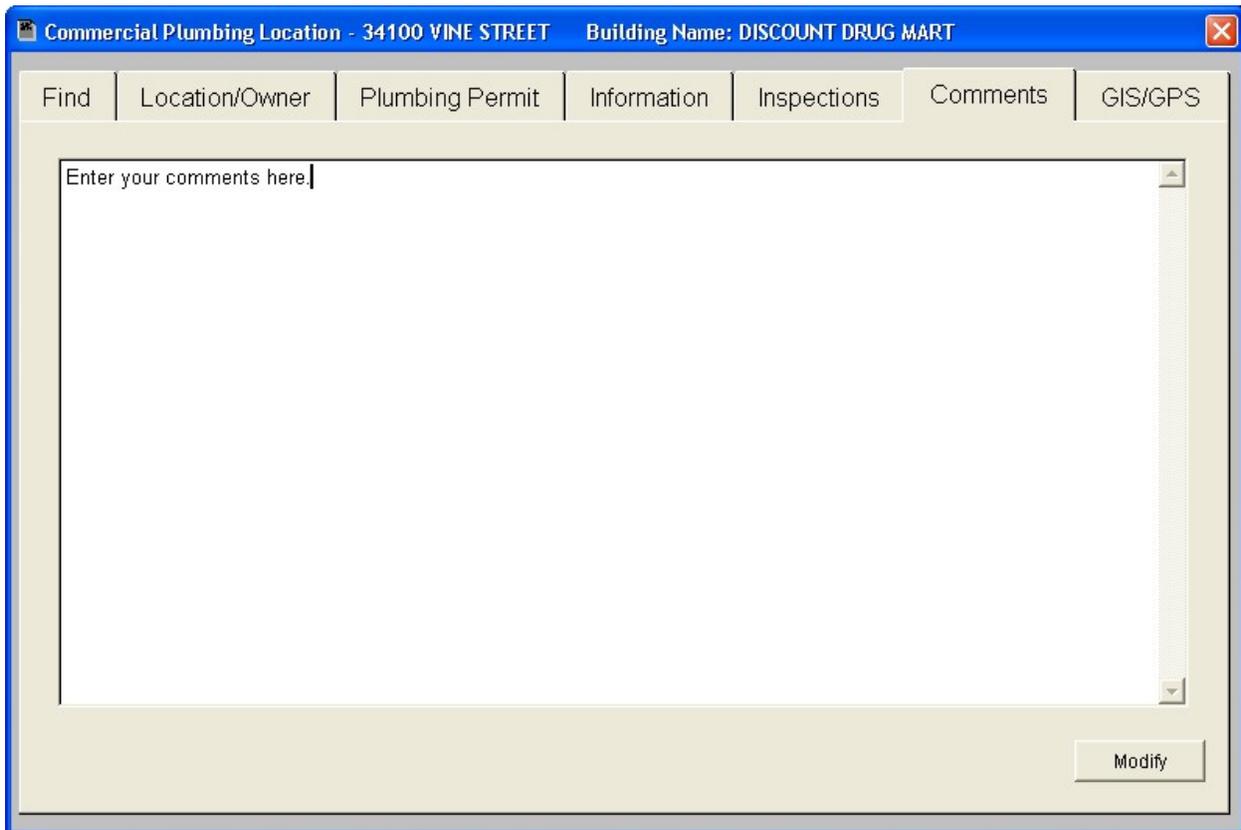
Next Previous Delete Add Modify

Field/Button	Description
Inspection Date	Enter the date of the inspection.
Plumbing Permit #	Enter the plumbing permit number.
Inspector	Choose the inspector who performed the inspection.
Reason	Choose the reason for the inspection.
Status	Choose the status of the inspection.
Memo	Click to enter notes on the inspection.
Next	Click to go to the next inspection.
Previous	Click to go to the previous inspection.
Delete	Click to delete the inspection
Add	Click to add an inspection.
Modify	Click to modify the information on the page.

Comments



Comments



Commercial Plumbing Location - 34100 VINE STREET Building Name: DISCOUNT DRUG MART

Find | Location/Owner | Plumbing Permit | Information | Inspections | Comments | GIS/GPS

Enter your comments here.

Modify

The comments page is for entering your own comments on the commercial plumbing location.

GIS/GPS



GIS/GPS

Commercial Plumbing Location - 34100 VINE STREET Building Name: DISCOUNT DRUG MART
X

Find
Location/Owner
Plumbing Permit
Information
Inspections
Comments
GIS/GPS

Global Information System

Street #	Prefix Direction	Prefix Type	Street name	Street Suffix	Prefix Direction
<input type="text" value="34100"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="VINE"/>	<input type="text" value="STREET"/>	<input type="text"/>

Global Positioning System

Latitude Decimal Value	Longitude Decimal Value
<input type="text"/>	<input type="text"/>

The GIS/GPS tab allows you to enter your GPS coordinates for mapping purposes.

Field/Button	Description
Street #	(automatically filled out when you enter the address)
Prefix Direction	(automatically filled out when you enter the address)
Prefix Type	(automatically filled out when you enter the address)
Street Name	(automatically filled out when you enter the address)
Street Suffix	(automatically filled out when you enter the address)
Prefix Direction	(automatically filled out when you enter the address)
Latitude Decimal Value	Enter the latitude DECIMAL value of the location
Longitude Decimal Value	Enter the longitude DECIMAL value of the location
Modify	Click to modify the information on the page

Print Button



Print

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

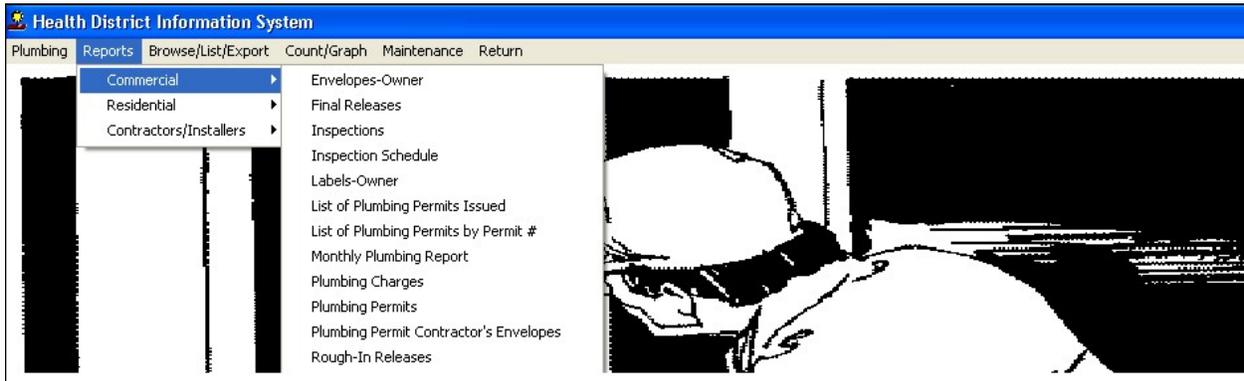
Field/Button	Description
Plumbing Permit	Generates a commercial plumbing permit for the contractor.
Plumbing Permit (long form)	Generates a long form commercial plumbing permit for the contractor.
Home Owner’s Envelope	Prints an envelope addressed to the Home Owner.
Plumbing Contractor’s Envelope	Prints an envelope addressed to the contractor.
Print Invoice	This will generate an invoice for the contractor that meets the criteria set in the “From Permit Date” and “To Permit Date”.
Letter A - Contractor	Generates Letter “A” addressed to the Contractor. (The letters are set up under the “ Maintenance ” menu which will be explained later.
Letter B - Contractor	Generates Letter “B” addressed to the Contractor. (The letters are set up under the “ Maintenance ” menu which will be explained later.

Letter C - Contractor	Generates Letter "C" addressed to the Contractor. (The letters are set up under the " Maintenance " menu which will be explained later.
Letter D – Home Owner	Generates Letter "D" addressed to the Home Owner. (The letters are set up under the " Maintenance " menu which will be explained later.
Letter E – Home Owner	Generates Letter "E" addressed to the Home Owner. (The letters are setup in under the " Maintenance " menu which will be explained later.
Letter F – Home Owner	Generates Letter "F" addressed to the Home Owner. (The letters are set up under the " Maintenance " menu which will be explained later.
Preview	Previews the printout.
Print	Prints the form.
OK	Prints/previews the form.
Close	Closes the print menu.
Update Date Issued	After printing a permit, this button will appear. Click to update the date issued.

Reports



Reports



The **Commercial Plumbing** module has a set of pre-defined reports from which to choose. Each report will ask for **From Inspection date** and a **To inspection date**. This enables you to choose a particular time frame for your reports.



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

Reports

Report	Description
Envelopes - Owner	Addresses envelope to each owner of the commercial plumbing location that meets the criteria set in the “from inspection date” and “to inspection date”.
Final Releases	Use this report if you need to notify the building inspector.
Inspections	Generates a list of inspection records that meets the criteria set in the “from inspection date” and “to inspection date”.
Inspection Schedule	If you enter inspection dates prior to the inspector actually doing the inspection, this would print out a list of inspections to be done. Upon return, he may fill out what occurred on the inspection window tab.
Labels - Owner	Generates mailing labels to the owner of the commercial plumbing location that meets the criteria set in the “from inspection date” and “to inspection date”.

List of Plumbing Permits Issued	Generates a list of plumbing permits issued that meets the criteria set in the “from inspection date” and “to inspection date”.
List of Plumbing Permits by Permit #	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.
Monthly Plumbing Report	Generates a count report for permits, fixtures, and total amount for each political subdivision by month. Report also includes year to date and last year to date information.
Plumbing Charges	Generates a list of plumbing charges for the commercial plumbing locations that meet the criteria set in the “from date” and “to date” issued.
Plumbing Permits	Generates your plumbing permits in bulk that meet the criteria set in the “from inspection date” and “to inspection date”.
Plumbing Permit Contractor’s Envelopes	Addresses envelope to each contractor of the commercial plumbing location that meets the criteria set in the “from inspection date” and “to inspection date”.
Rough In Releases	You this report if you need to notify the building inspector.

Maintenance - Add/Delete/Modify Tables



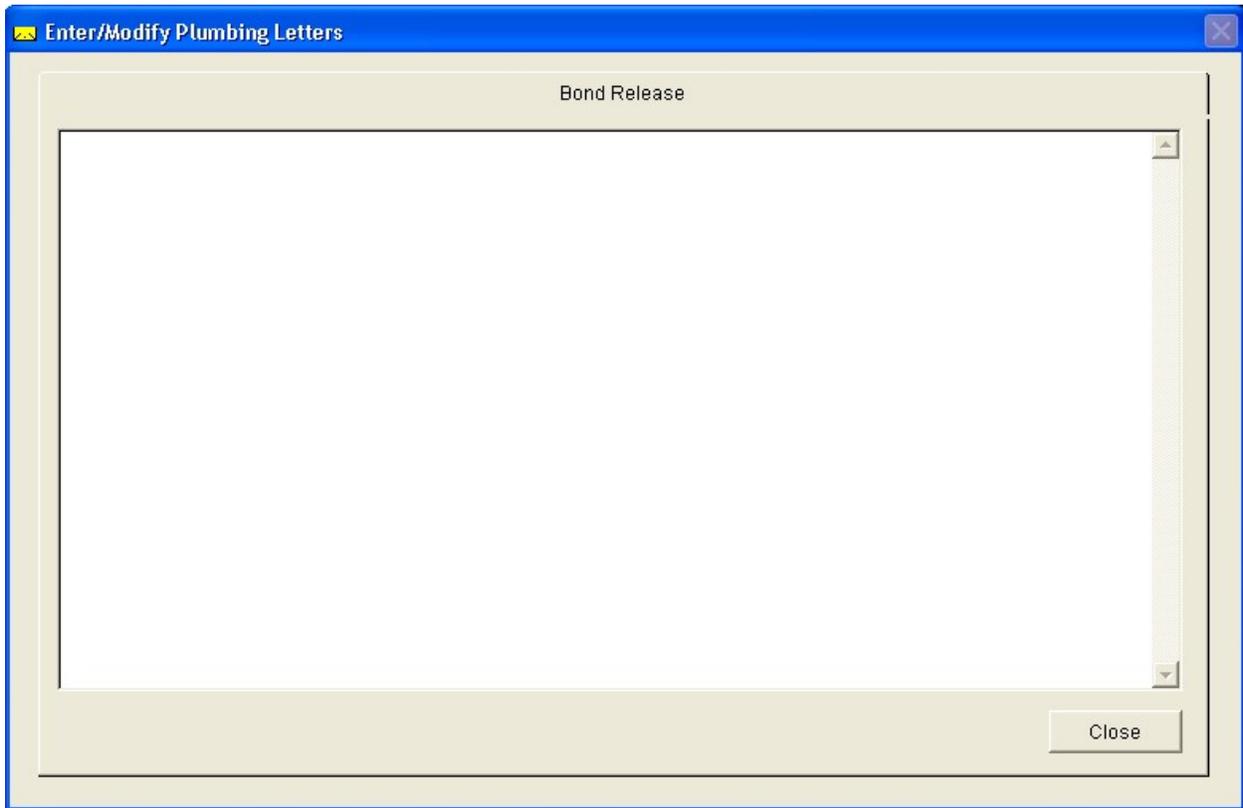
Maintenance



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



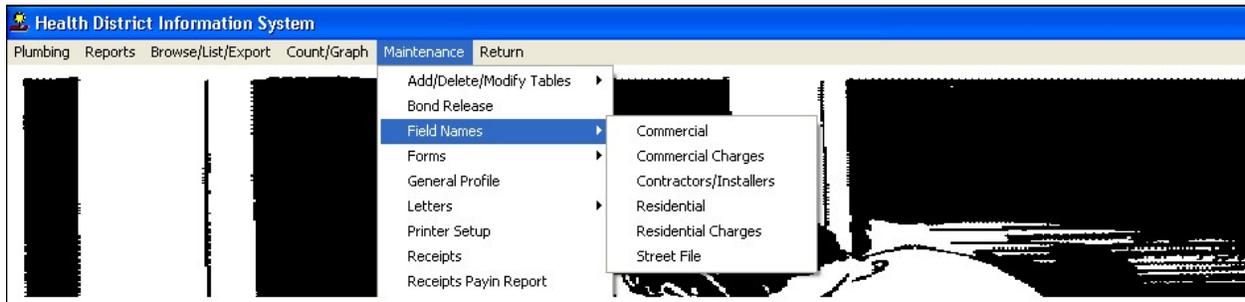
Bond Release



If you allow home owners to perform their own plumbing, you will use this to print a release.



Field Names - Commercial

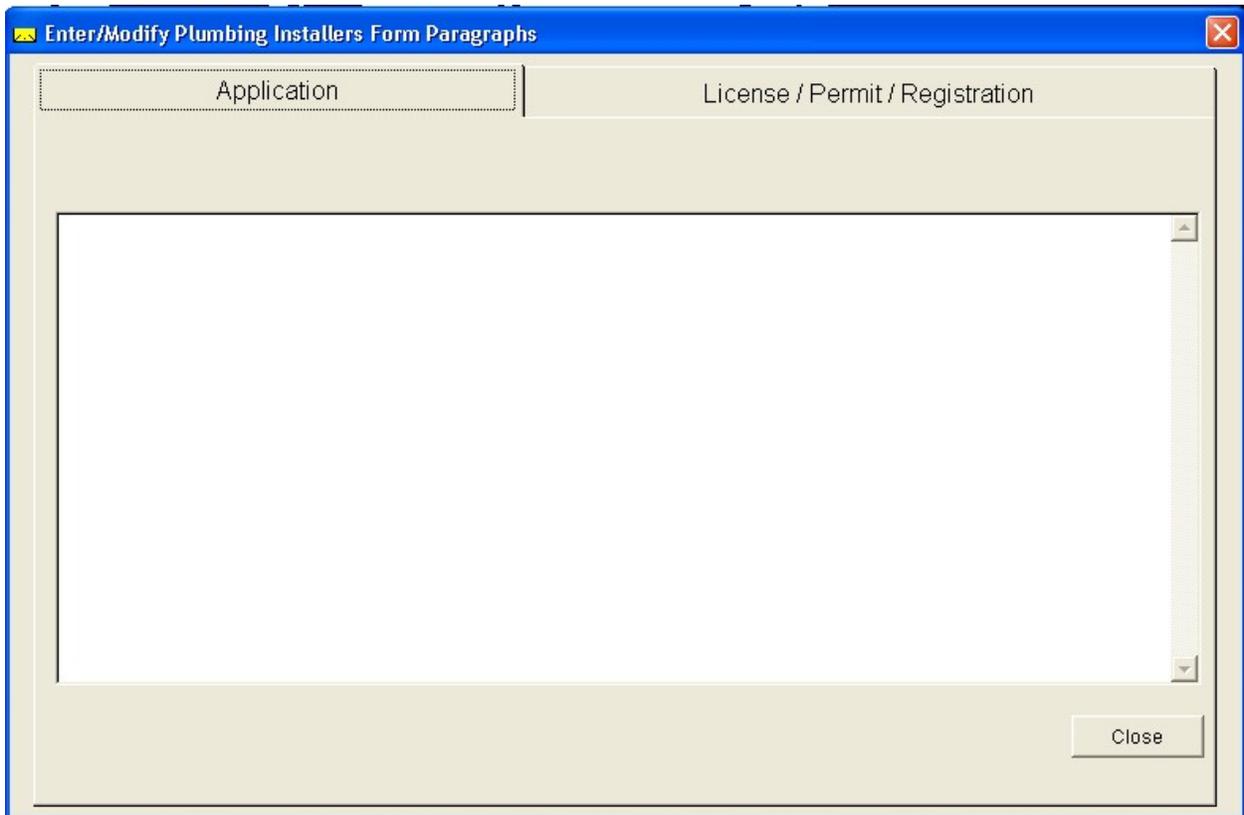
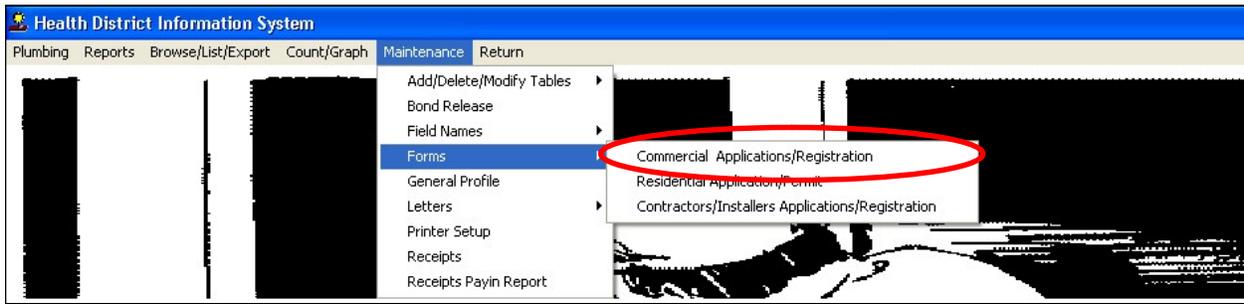


Field Name	Data Base Field Name
# OF STORIES	PLO.BUILD_STORIES
BUILDING(NEW/OLD)	PLO.BUILD_TYPE
CITY	PLO.CITY
CONTRACTOR	PLO.CONTRACTOR
DATE ISSUED	PLO.DATE_ISS
DATE PAID	PLO.DATE_PAID
DRAIN INSPECTION DATE	PLO.DRAIN_DATE
EXTENTION DATE	PLO.EXT_DATE
FINAL INSPECTION DATE	PLO.FINAL_DATE
FINAL NEVER COMPLETED	PLO.NO_FINAL
GIS/PREFIX DIRECTION	PLO.GIS_PRE_DIR
GIS/PREFIX TYPE	PLO.GIS_PRE_TYPE
GIS/STREET	PLO.GIS_STRT
GIS/STREET #	PLO.GIS_STRT_NO
GIS/STREET SUFFIX	PLO.GIS_STRT_SUF
GIS/STREET SUFFIX DIR	PLO.GIS_STRT_DIR
GPS/LAT DECIMAL	PLO.GPS_LAT_DEC
GPS/LON DECIMAL	PLO.GPS_LON_DEC
INSPECTOR	PLO.INSPECTOR
INSPECTOR'S CODE	PLO.I_CODE
INSTALLER'S NAME	PLO.INSTALLER
LICENSE #	PLO.ID
NAME OF BUSINESS	PLO.BUILD_NAME

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 – Commercial 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

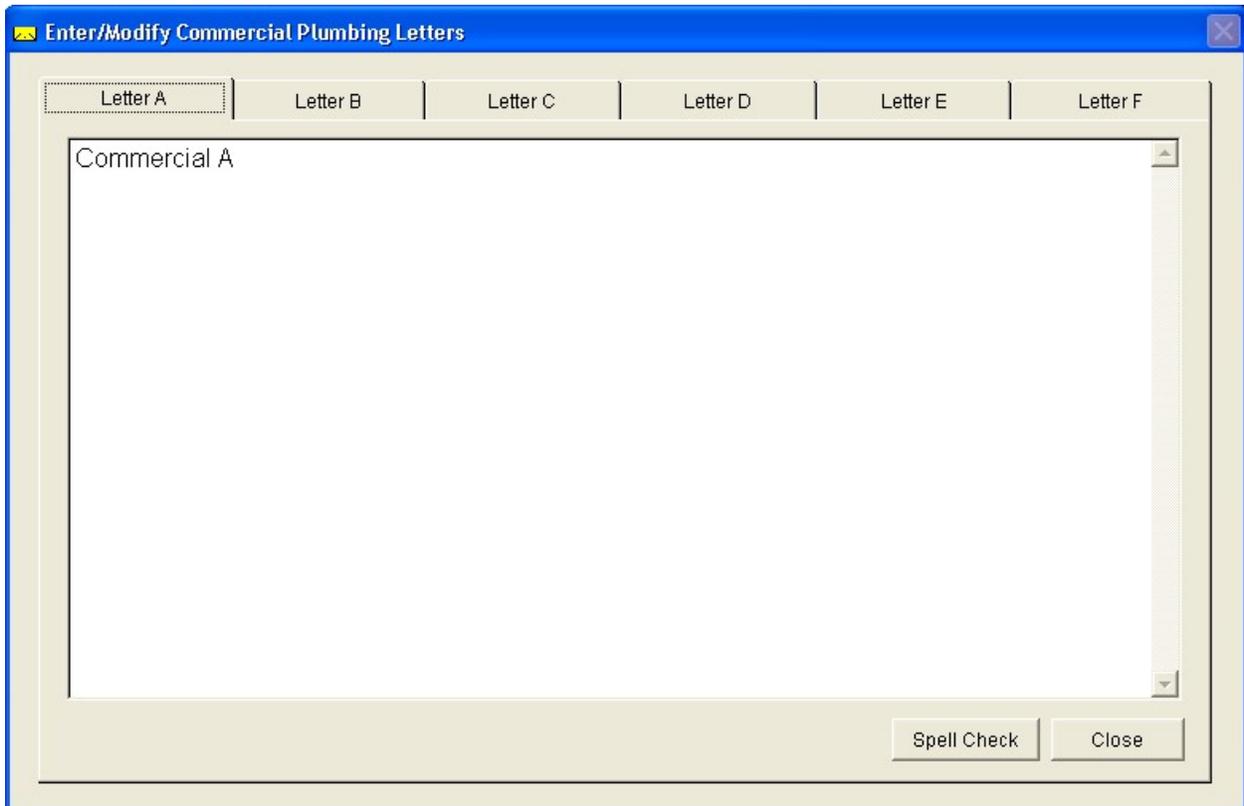
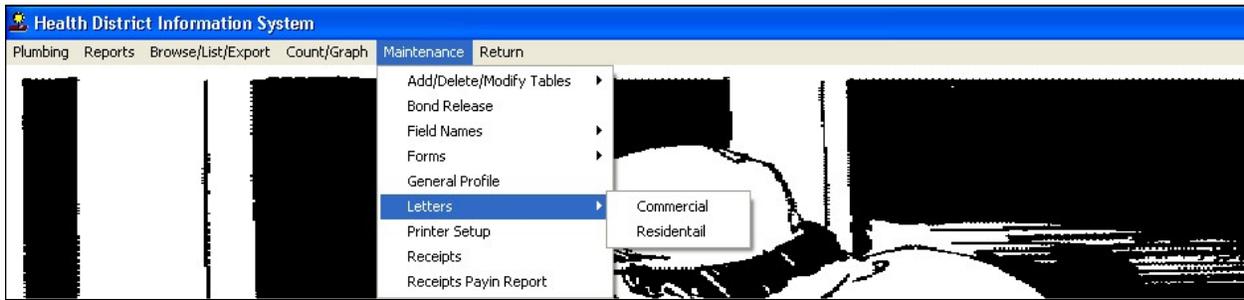
Letters - 2 1/2" left margin

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.



Letters - Commercial

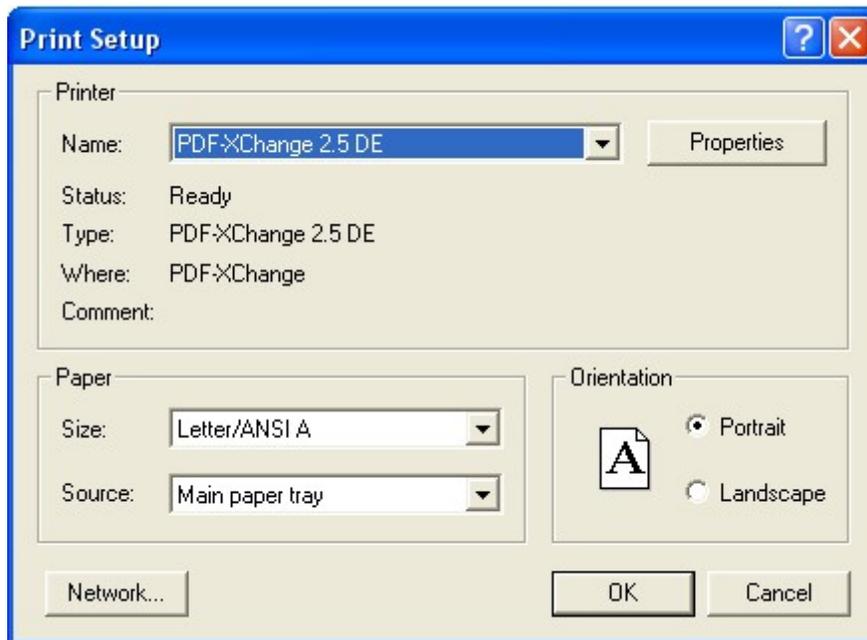


HDIS provides you with the flexibility to write standard letters that can be sent to clients. These letters will pull data through use of the *. The * is placed on each end of the field name that you want to pull into the letter. Use **capital letters** to describe the field name.

Example: *OWNER* = TOM GORDON



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

Receipts

Date: 12/12/2005 Received by:

Fee Code: 00026 Fee Description: PLUMBING REGISTRATION Quantity: 1 Amount: 90.00 Check #/Cash:

Per. # / Lic.# / ID# Name Address/Comment

Code	Description	Quantity	Amount	Check#	Name	Address/Comment

Totals Quantity: 0 Amount: 0.00 Receipt # 12218

If your health department has the **“Receipts”** module, you have the ability to print any receipt through the **“Maintenance”** tab. You may also print a receipt from the Commercial data entry windows by pressing **ALT-R** keys.



Receipts Pay In Report

Print Pay In or Receipt

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

Pay In by Receipt Book
 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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