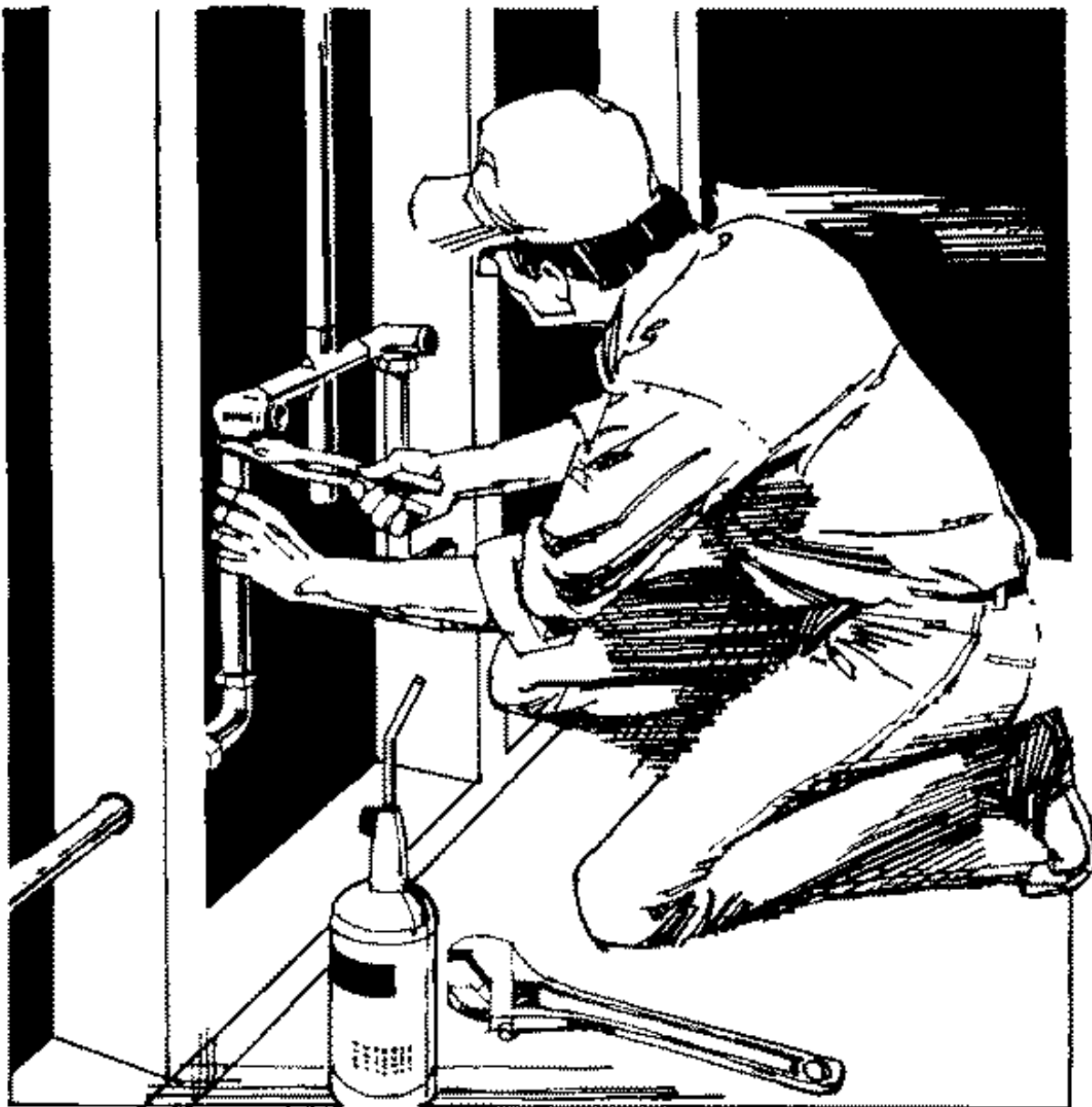


# Plumbing – Contractors/Installers



**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](mailto: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](mailto: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**

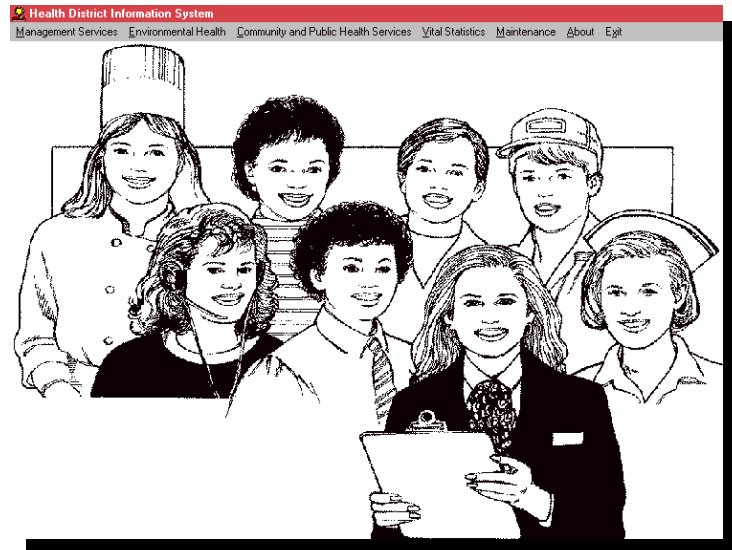
**Programs**

**Health District Info Systems**

**HDIS**

# Health District Information System Menu Bar

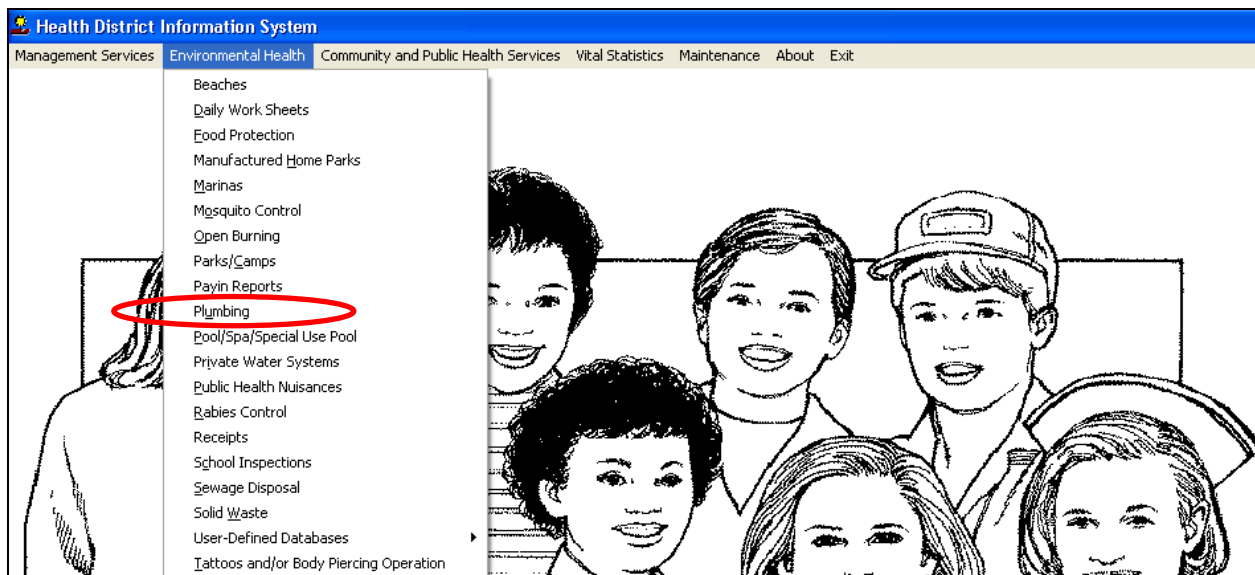
**HDIS (Health District Information System)** has several different modules designed to assist your health district in its day-to-day operations. The **Contractors/Installers Module** is a great addition to these modules and simplifies your record keeping, billing and information management needs.



Select Environmental Health



Select Plumbing



Select Contractors/Installers



# Entering a Contractor

Registration #	Name	Street
8	881, INC.	881 WEST MAIN STREET
26	A & G MAINTENANCE	10107 HILLCREST ROAD
29	A & J PLUMBING INC	5185 RIVER ROAD
76	A. J. PARKER PLUMBING & HEATING INC	3919 ERIE STREET
111	AAA PIPE CLEANING CORP	7277 BESSEMER AVENUE
52	ACORN MECHANICAL	3590 EAST 153 STREET
99	AIR-TEMP MECHANICAL	3013 PAYNE AVENUE
21	ALL AROUND PLUMBING INC.	773 SHERWOOD DRIVE
74	AMERICAN MECHANICAL CONTRACTORS C	3871 CHURCH STREET
108	ARS PLUMBING & RESCUE ROOTER	4547 HINCKLEY INDUSTRIA
30	ASBURY PLUMBING INC	1869 REDBIRD ROAD
43	B.M.V. MECHANICAL	10 WESTFIELD LANE
70	BAINBRIDGE MECHANICAL INC	8780 CRACKEL ROAD
71	BARNETT PLUMBING SERVICES	2393 ARLINGTON
84	BIG T PLUMBING	2452 BADANABUM ROAD

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="text"/>			
<input type="checkbox"/> <b>Out of business</b> OOB date    / /			
<div>Print</div> <div>Modify</div>			

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 <b>Alt R</b> 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.

The screenshot shows a software interface titled "Plumbing Contractors / Installers - ACORN MECHANICAL". It features four tabs at the top: "Find", "Information", "Licensing Information", and "Installers". The "Installers" tab is selected, showing a table with five columns: "Id#", "Installer", "Date issued", "Local Fee", and "Paid". The table is empty. Below the table, there are four buttons: "Delete Installer", "Add Installer" (circled in red), "Print", and "Modify".

Id#	Installer	Date issued	Local Fee	Paid

Buttons at the bottom:

- Delete Installer
- Add Installer (highlighted)
- Print
- Modify

To enter an installer, click the **“Add Installer”** button.



# Print Button



**Print**

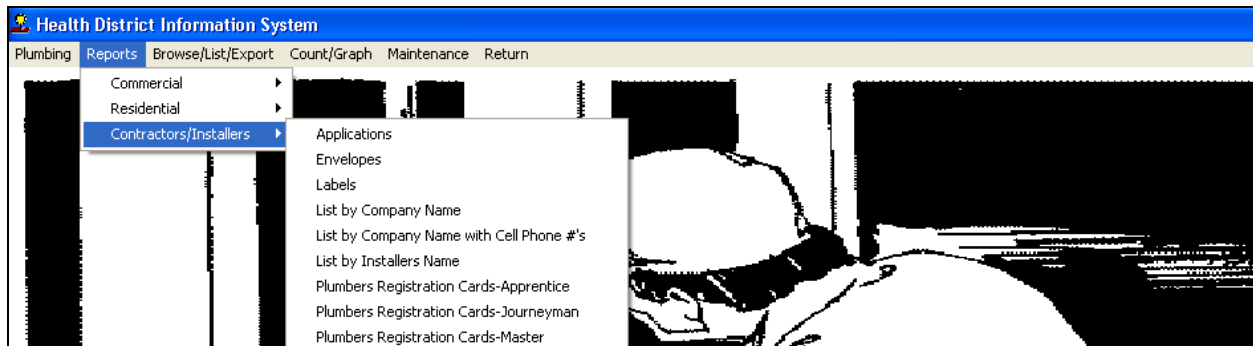
**Print:** The “**Print**” button is available on all the tabs.

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

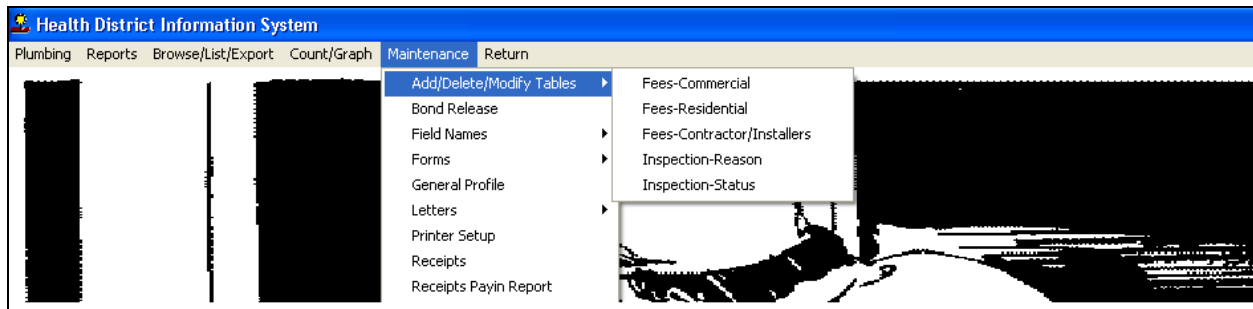
Report	Description
Applications	Generates applications for each contractor that meets the criteria set in the “from date” and “to date” issued.
Envelopes	Addresses envelope to each contractor that meets the criteria set in the “from date” and “to date” issued.
Labels	Generates mailing labels for the 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.

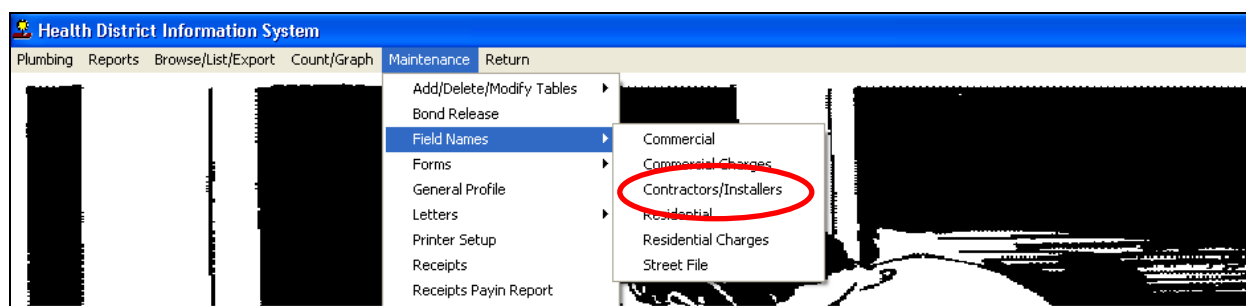


Field/Button	Description
Code	Enter the code of the fee
Description	Enter the description of the code
Local Fee	Enter your local health department fee
Close	Closes the table
Add New Fee	Adds a new fee to the table
Delete Fee	Deletes the highlighted fee
Update New Fees	Updates all contractors based on the fees in the fee table
Print	Prints a list of fee codes





## Field Names – Contractors/Installers

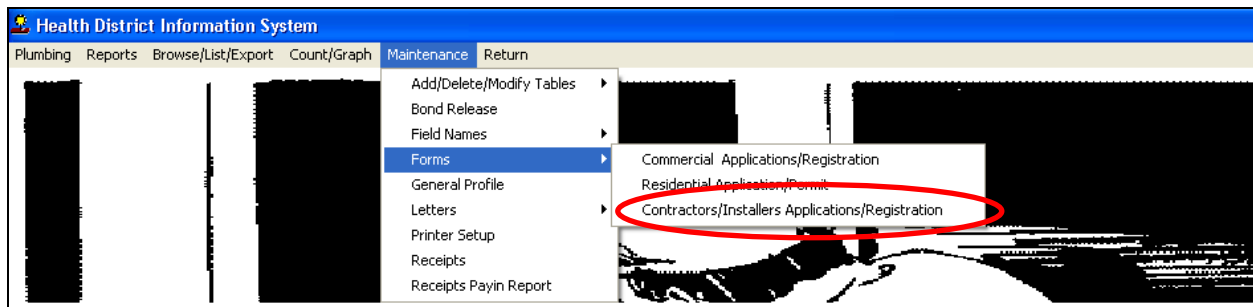


Data Base Field Names for Plumbing Contractors/Installers		Close
Field Name	Data Base Field Name	Print
APPLICANT CITY	PLC.MAIL_CITY	
APPLICANT PHONE	PLC.MAIL_PHONE	
APPLICANT STATE	PLC.MAIL_STATE	
APPLICANT STREET	PLC.MAIL_ST	
APPLICANT ZIP	PLC.MAIL_ZIP	
BACKFLOW TECHNICIAN	PLC.BACK_TECH	
BOND COMPANY	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



The screenshot shows the 'Enter/Modify Plumbing Installers Form Paragraphs' window. The window has a blue title bar and a close button in the top right corner. It features two tabs: 'Application' and 'License / Permit / Registration'. The 'Application' tab is currently selected. The main area of the window is a large, empty text box with a vertical scrollbar on the right side. A 'Close' button is located in the bottom right corner of the window.

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**

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 screenshot shows a 'Print Setup' dialog box with a blue title bar and standard window controls. It is divided into several sections: 'Printer' with a name dropdown (set to 'PDF-XChange 2.5 DE'), status ('Ready'), type ('PDF-XChange 2.5 DE'), where ('PDF-XChange'), and comment; 'Paper' with size ('Letter/ANSI A') and source ('Main paper tray') dropdowns; and 'Orientation' with a paper icon and radio buttons for 'Portrait' (selected) and 'Landscape'. At the bottom are 'Network...', 'OK', and 'Cancel' buttons.

**Print Setup**

Printer

Name: PDF-XChange 2.5 DE Properties

Status: Ready

Type: PDF-XChange 2.5 DE

Where: PDF-XChange


Comment:

Paper

Size: Letter/ANSI A

Source: Main paper tray

Orientation

 ☒ Portrait ☐ Landscape

Network... OK Cancel

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

Print

Close

Fee Code

00026

Fee Description

PLUMBING REGISTRATION

Quantity

1

Amount

90.00

Check #/Cash

Per. # / Lic.# / ID#

Name

Address/Comment

Add Fee

Delete Fee

Code	Description	Quantity	Amount	Check#	Name	Address/Comment

Totals

0

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 Contractor 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  
[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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