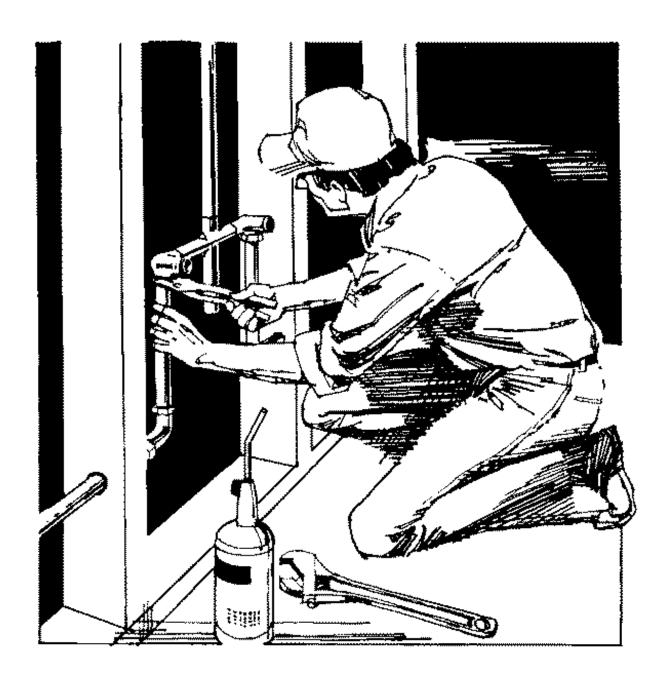
Plumbing - Residential



User's Manual

Plumbing - Residential

Health District Information System HDIS (Windows Ver. 4.0)

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Specialist in Comprehensive Health Care Software helpdesk@hdis.org

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Introduction

This program is designed to assist you in organizing a systematic approach to entering your residential 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 Residential 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 $\,$, $\,$ 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



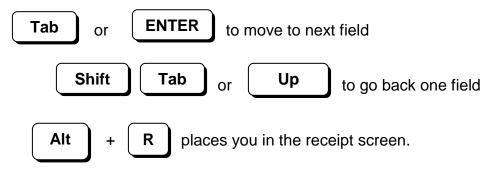
click the left side of your mouse once.

Whenever you see two

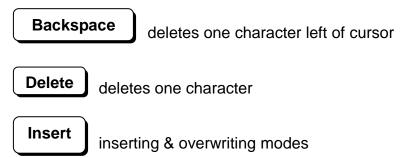


click the left side of your mouse twice.

Navigation Keys For Entering Information



Editing Keys



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



Starting HDIS

MICROSOFT Windows Users

Start

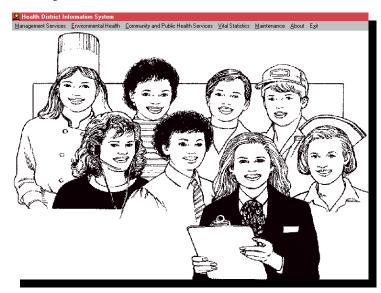
Programs

Health District Info Systems

HDIS

Health District Information System Menu Bar

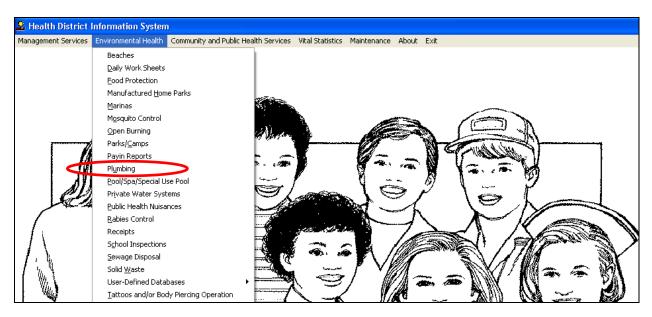
HDIS (Health District Information System) has several different modules designed to assist your health district in its day-to-day operations. The **Residential Plumbing module** is a great addition to these modules and simplifies your record keeping, billing and information management needs.





Select Environmental Health

Select Plumbing

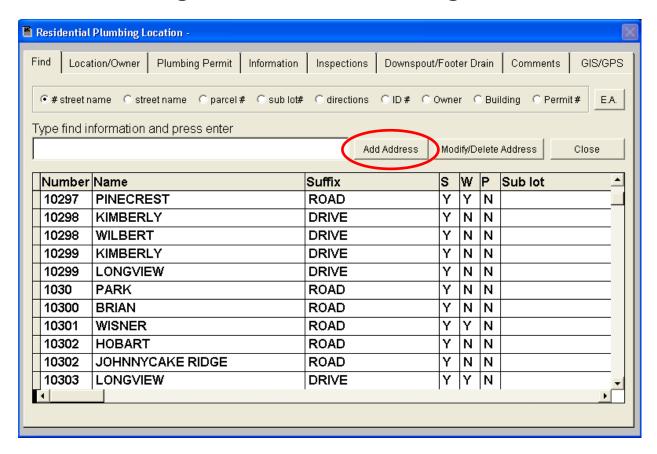




Select Residential



Entering a Residential Plumbing Location



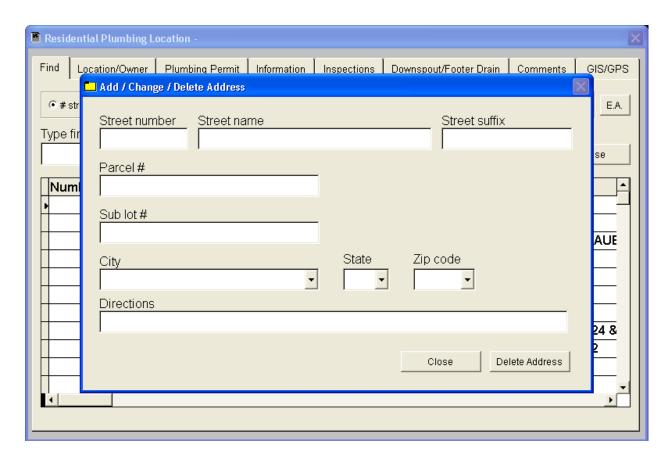
The **FIND** tab on the Residential Plumbing window is for locating a residential plumbing location. You can browse through the grid to find an address or type the address in the "**Type find information and press enter**" field. You may also locate by Street Name (do not include street #), Parcel #, Sub Lot #, Directions, ID#, Owner, Building or Permit # by clicking on the proper Radio button, entering the information and then pressing the "enter" key.

To modify or delete an existing address in the grid, find the address and click the "Modify/Delete Address" button.

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

The Grid is the address table that is shared by Residential Sewage, Private Water Systems and Plumbing. The columns to the right of the address indicate whether that address also has a sewage, well or plumbing record.

The E.A. (Environmental Assessment) button allows you to view information about this address (sewage, private water systems, plumbing, public health nuisance and rabies control).



When the "**Add Address**" button is clicked the window above will appear for you to enter the new address. When finished, click the "**Close**" button.

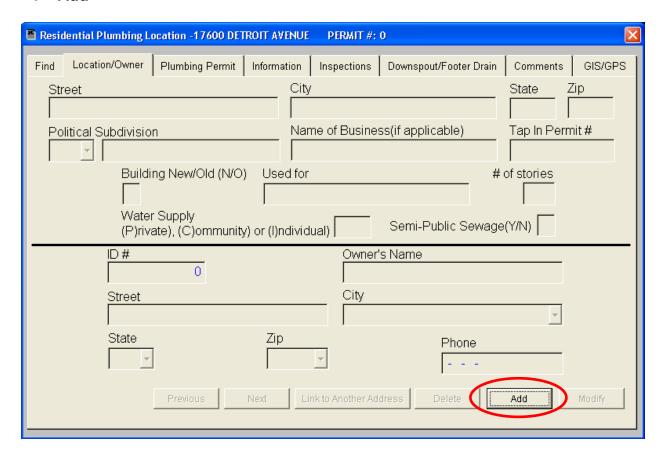
The same window will appear when you click the "**Modify/Delete Address**" button. If you wish to modify an existing address, make your changes and click to the "**Close**" button.

To delete the address, click the "Delete Address" button.

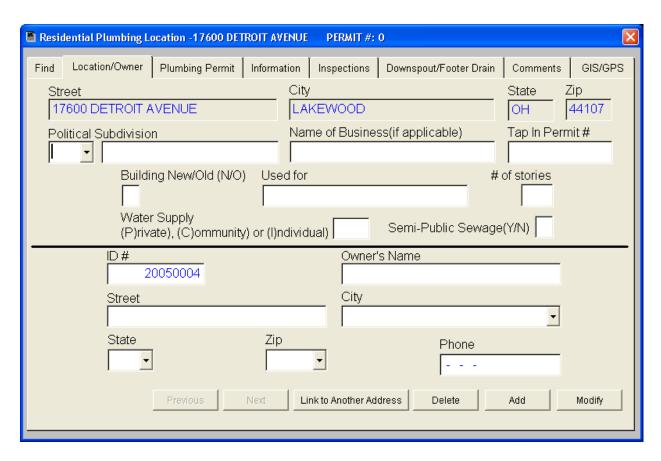
Location/Owner



Add



Once an address has been added, you are now ready to add additional information. To do this, click the "Add" button.



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"

**Shortcut Keys: When you are in the "Owner's Name Field:

CTRL-L to copy the location address from above

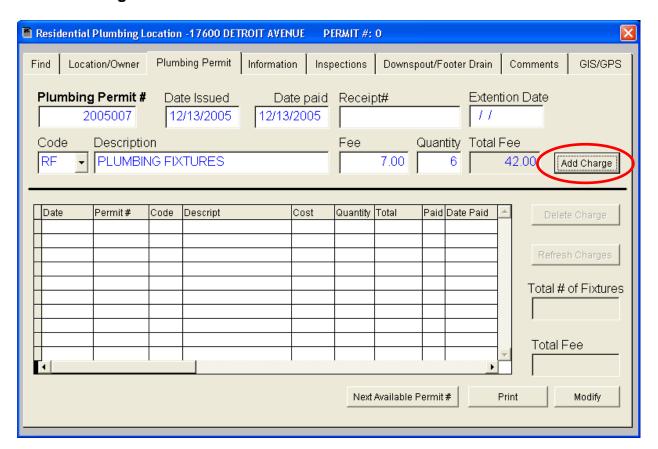
CTRL-S to copy the owner information from a previously entered owner Sewage Disposal Residential record.

CTRL-W to copy the owner information from a previously entered owner Private Water Systems record

Plumbing Permit



Plumbing Permit



On this page you will enter the information for the plumbing permit. Fill out the information for the permit across the top of the page and add the charges to the grid below. In this case, we are going to add a plumbing fixtures charge to the grid.

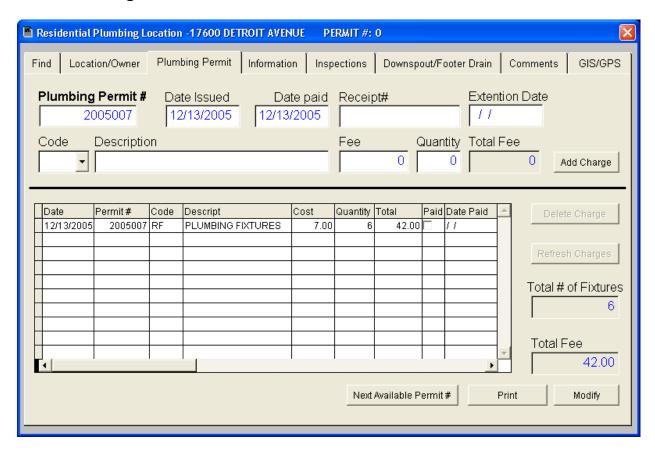
| Field/Button | Description |
|--------------------------|--|
| Plumbing Permit # | Enter the plumbing permit number. |
| Date Issued | Enter the date the permit was issued. |
| Date Paid | Enter the date the permit was paid. |
| Receipt # | Enter the receipt number for the permit. If you have the |
| | Receipts module, press Ctrl R to print a receipt. |
| Extension Date | Enter the date if an extension was given. |
| Code | Choose the fee code for the contractor |
| Description | (filled out once fee code is selected) |
| Fee | (filled out once fee code is selected) |
| Quantity | Enter the quantity for the specific fee code. |
| Total Fee | (filled out once fee code is selected) |
| Total Number of Fixtures | (filled out once fee code is selected) |
| Add Charge | Click to add a charge to the grid. |
| Delete Charge | Click to delete a charge from the grid |

| Refresh Charges | If needed, Click to refresh the totals |
|-------------------------|--|
| Next Available Permit # | This will automatically find the next available Permit # |
| Paid | Check if the charge was paid. |
| Date Paid | Enter the date paid. |
| Receipt # | Enter the receipt number. |
| Print | Opens the print menu. |
| Modify | Click to modify the information on the page. |

[&]quot;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 enables you to enter descriptions of your choice.



Add Charge



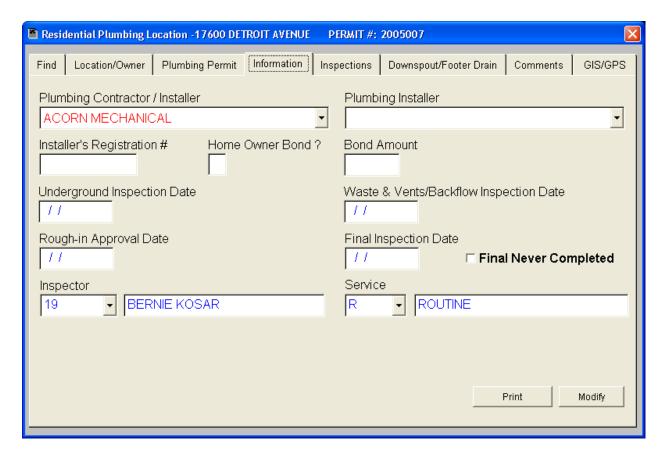
The charge was added to the grid and the total fee field has been updated for the current charge. You can now add more charges to the grid for the permit.

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



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

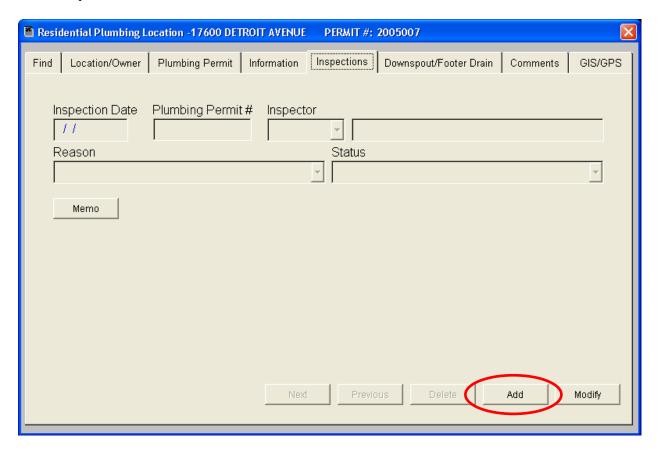
** **Note**: The Plumbing Contractor will appear in red if the contractor is not registered for the current year.

| Field/Button | Description |
|------------------------------------|---|
| Plumbing Contractor | Choose the plumbing contractor. |
| Plumbing Installer | Choose the plumbing installer. |
| Underground Inspection Date | Enter the underground inspection date. |
| Waste & Vents Backflow | Enter the waste and vents/backflow inspection date. |
| 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



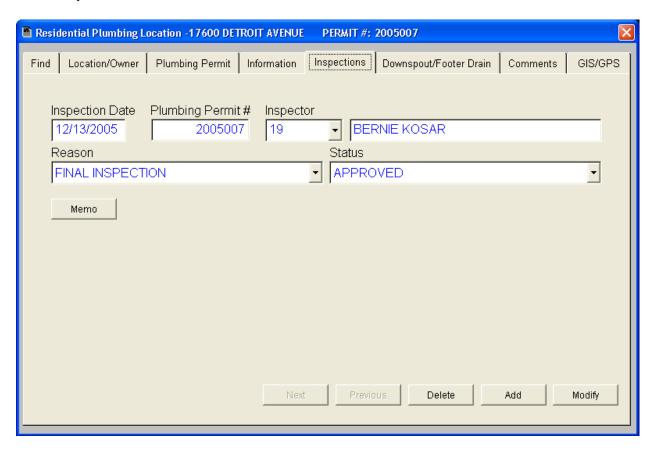
Inspections



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



Inspections

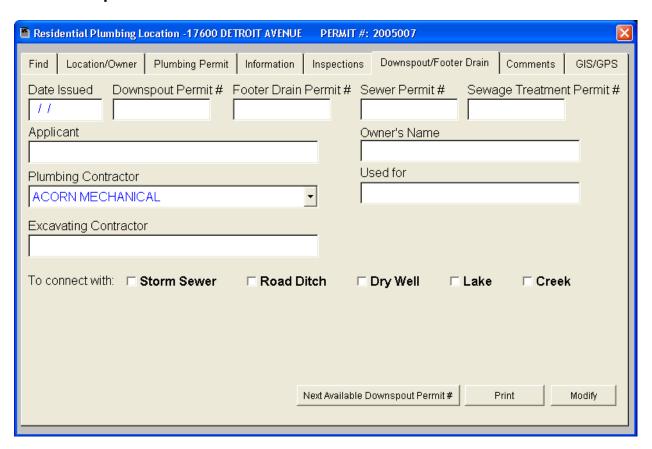


| Field/Button | Description |
|-------------------|--|
| Inspection Date | Enter the date of the inspection. |
| Plumbing Permit # | (automatically filled out) |
| Inspector | Choose the inspector who performed the inspection. |
| Reason | Choose the reason for the inspection. |
| Status | Choose the 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. |

Downspout/Footer Drain



Downspout/Footer Drain



The "Downspout/Footer Drain" tab enables you to capture downspout/footer permits.

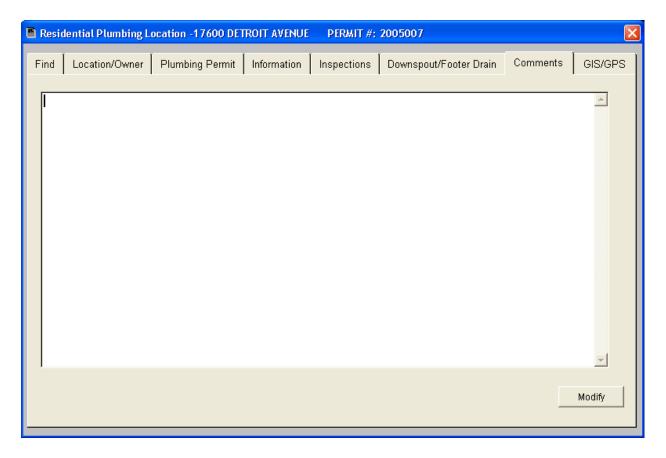
| Field/Button | Description |
|---------------------------|--|
| Date Issued | Enter the date that the permit was issued. |
| Downspout Permit # | Enter the downspout permit #. |
| Footer Drain Permit # | Enter the footer drain permit #. |
| Sewer Permit # | Enter the sewer permit #. |
| Sewage Treatment Permit # | Enter the sewage treatment permit #. |
| Applicant | Enter the applicant's name. |
| Owner's Name | (automatically filled out from "Location/Owner" tab) |
| Plumbing Contractor | (automatically filled out from "Information" tab) |
| Used For | Enter what the downspout/footer drain is used for. |
| Excavating Contractor | Enter the name of the excavation contractor. |
| Storm Sewer | Check if it is a storm sewer. |
| Road Ditch | Check if it is a road ditch. |
| Dry Well | Check if it is a dry well. |
| Lake | Check if it is a lake. |
| Creek | Check if it is a creek. |

| Next Available Downspout | This will automatically find the next available Downspout |
|--------------------------|---|
| Permit # | Permit # |
| Print | Click to open the print menu. |
| Modify | Click to modify the information on the page. |

Comments



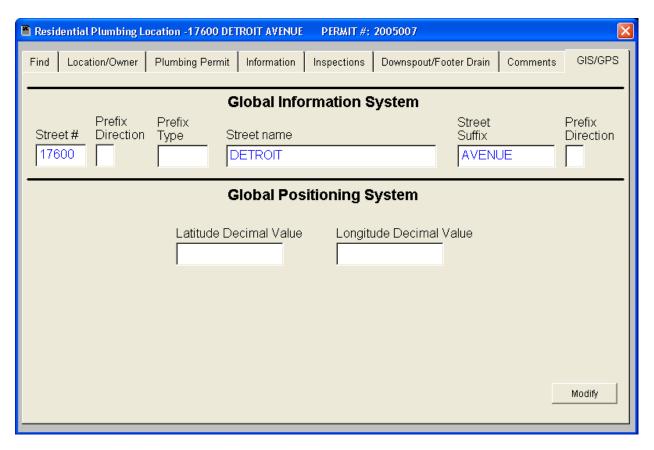
Comments



The comments page enables you to enter your own comments on the residential plumbing location.

GIS/GPS





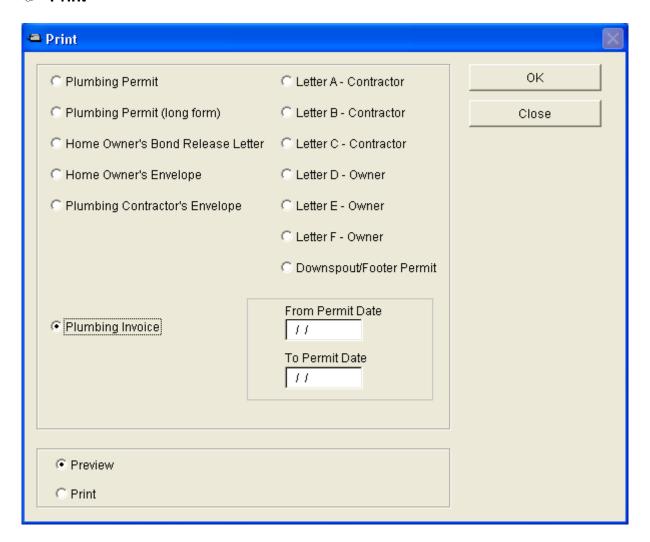
The GIS/GPS tab allows you to enter your GPS coordinates for mapping purposes.

| Field/Button | Description |
|-------------------------|--|
| Business Owner | Enter the email address of the business owner |
| Business Operator | Enter the email address of the business operator |
| Manager | Enter the email address of the manager |
| Chain Owner | Enter the email address of the chain owner |
| Other | Enter any other important email address |
| 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.

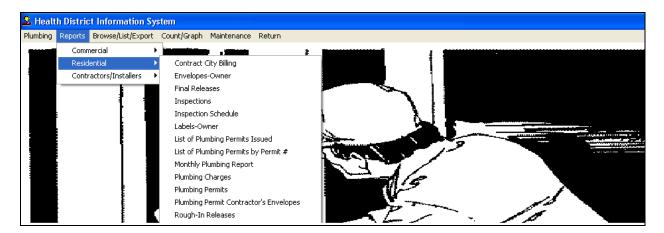
| Field/Button | Description |
|-----------------------------|---|
| Plumbing Permit | Generates a residential plumbing permit for the contractor. |
| Plumbing Permit (long form) | Generates a long form residential plumbing permit for the |
| | contractor. |
| Home Owner's Bond | Use this if the home owner is doing the plumbing. |
| Release Letter | |
| Home Owner's Envelope | Prints an envelope addressed to the Home Owner. |
| Plumbing Contractor's | Prints an envelope addressed to the contractor. |
| Envelope | |
| Plumbing Invoice | Generates 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 setup under the "Maintenance" menu which will be explained later. |
|-------------------------|---|
| Letter B - Contractor | Generates Letter "B" addressed to the Contractor. (The letters are setup under the "Maintenance" menu which will be explained later. |
| Letter C - Contractor | Generates Letter "C" addressed to the Contractor. (The letters are setup under the "Maintenance" menu which will be explained later. |
| Letter D – Home Owner | Generates Letter "D" addressed to the Home Owner. (The letters are setup 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 setup under the "Maintenance" menu which will be explained later. |
| Downspout/Footer Permit | Permit for Downspout/Footer |
| 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. |

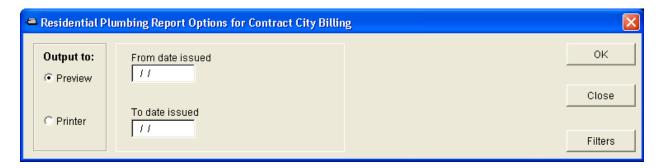
Reports



Reports



The Residential Plumbing module has a set of pre-defined reports from which to choose. Each report will ask for a **From Inspection date** and a **To inspection date**. This is 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

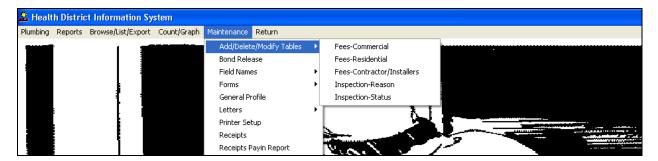
| Report | Description |
|-----------------------|--|
| Contract City Billing | Special Report for Franklin County |
| Envelopes - Owner | Addresses envelope to each owner of the residential |
| - | plumbing location that meets the criteria set in the "from |
| | inspection date" and "to inspection date". |
| 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, the inspector can fill out what |
| | occurred in the inspection window tab. |

| Labels - Owner | Generates mailing labels to the owner of the residential 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 residential 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 residential plumbing location that meets the criteria set in the "from inspection date" and "to inspection date". |
| Rough In Releases | Use this report if you need to notify the building inspector. |

Maintenance - Add/Delete/Modify Tables

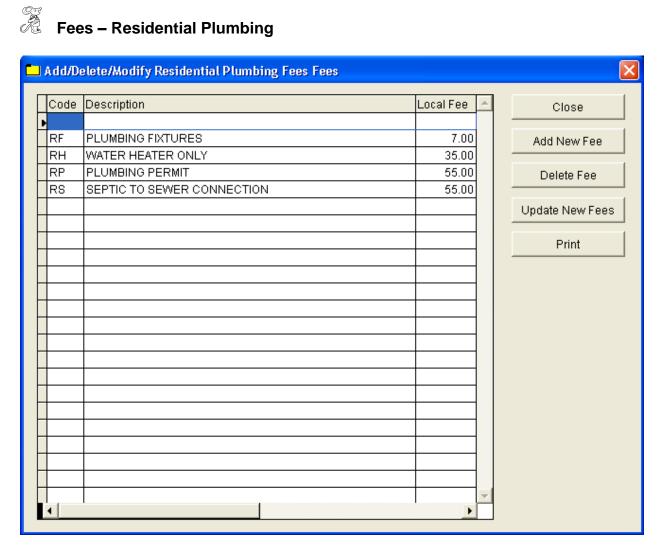


Maintenance



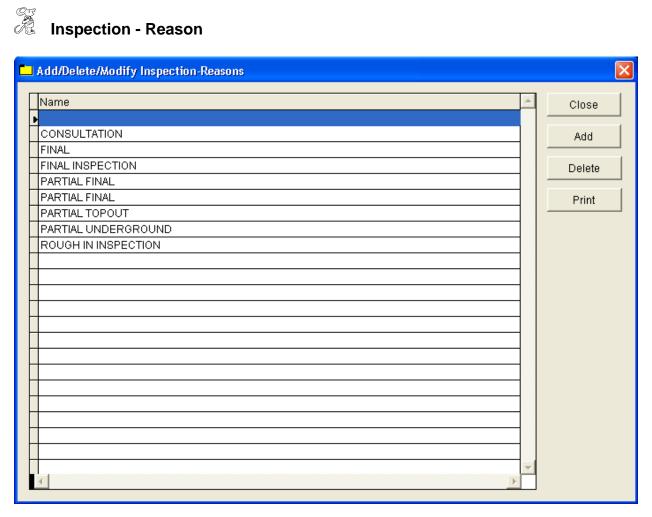
The maintenance menu contains a list of the tables that you can modify.





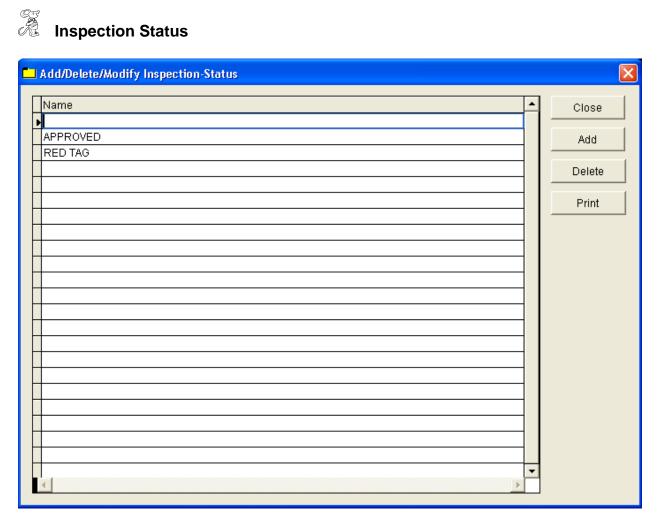
| Field/Button | Description |
|-----------------|--|
| Code | Enter the code of the fee |
| Description | Enter the description of the code |
| Local Fee | Enter your local health department fee |
| Close | Closes the table |
| Add New Fee | Adds a new fee to the table |
| Delete Fee | Deletes the highlighted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





| Field/Button | Description |
|--------------|---------------------------------|
| Name | Enter the inspection reason. |
| Close | Closes the table. |
| Add | Adds a reason to the table. |
| Delete | Deletes the highlighted reason. |
| Print | Prints a list of the reasons. |





| Field/Button | Description |
|--------------|---|
| Name | Enter the inspection status. |
| Close | Closes the table. |
| Add | Adds an inspection status to the table. |
| Delete | Deletes the highlighted status. |
| Print | Prints a list of the table. |



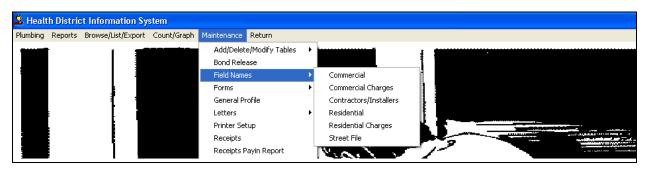
Bond Release

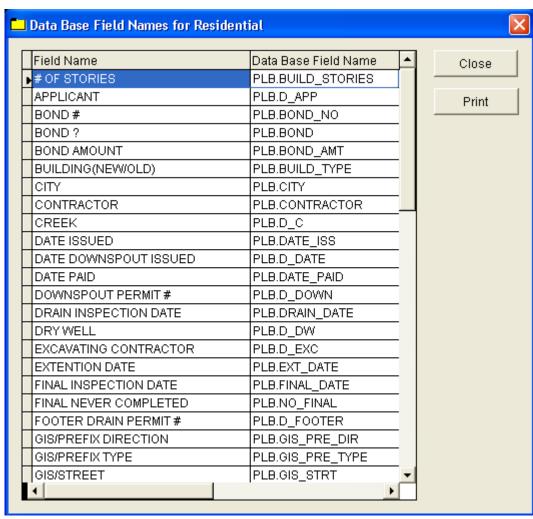


Use this if the home owner is doing their own plumbing.



Field Names - Residential

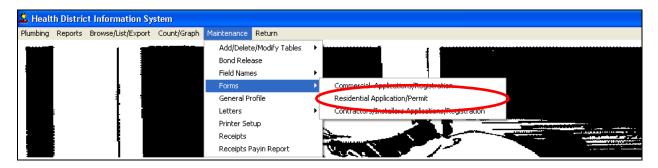


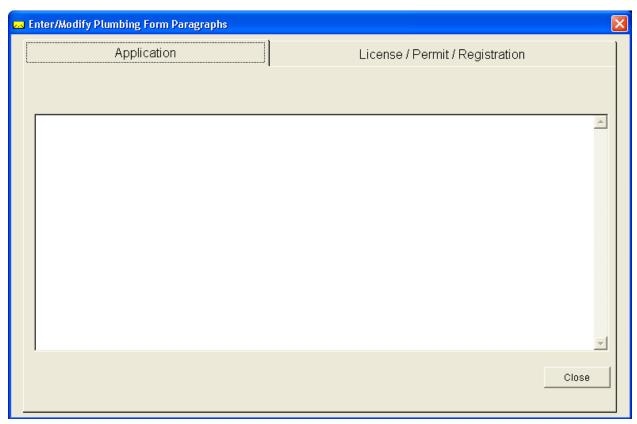


The **field names** listing can be very useful in determining what fields you wish to utilize to merge data for letters or when creating adhoc reports. The Field Name column is used to merge data into letters. Enter the field name in capital letters in the body of the letter surrounded by asterisks (no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



Forms – Residential Applications/Registration

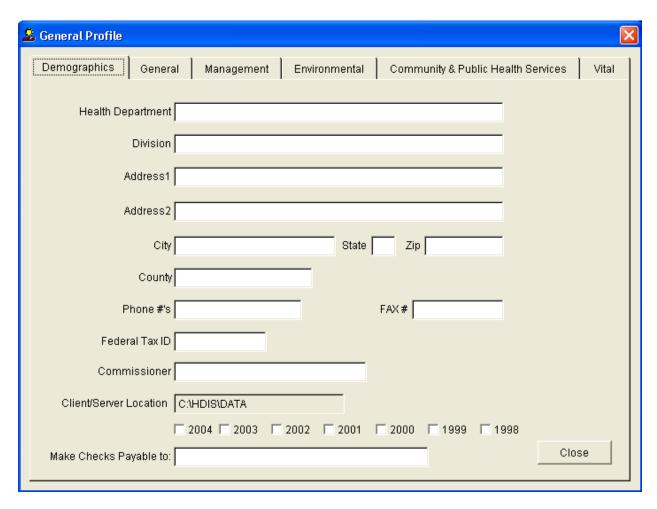




You are able to enter additional information to your application on registration forms for your contractors. This information will appear on **EVERY** application and license/permit/registration printout.



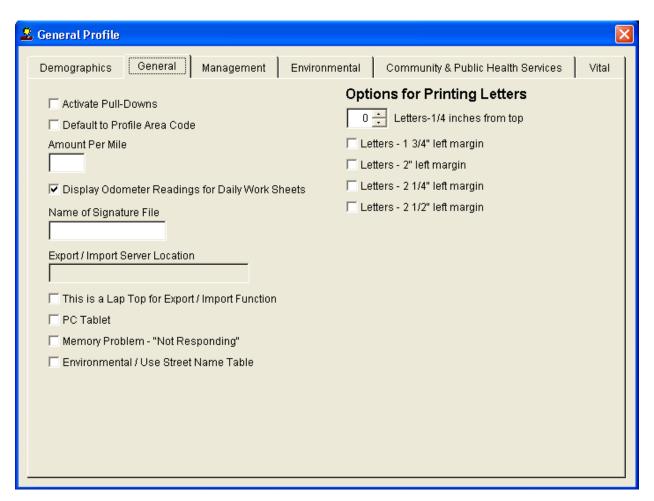
General Profile



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



General



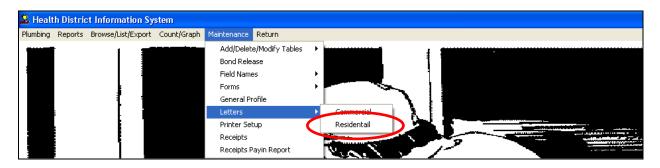
| Field/Button | Description |
|------------------------------|---|
| Activate Pull-Downs | Activates the "pull down" menus in HDIS |
| Default to Profile Area Code | Defaults every phone number area code to the area code entered in the "General Profile" on the "Demographics" page. |
| Amount Per Mile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

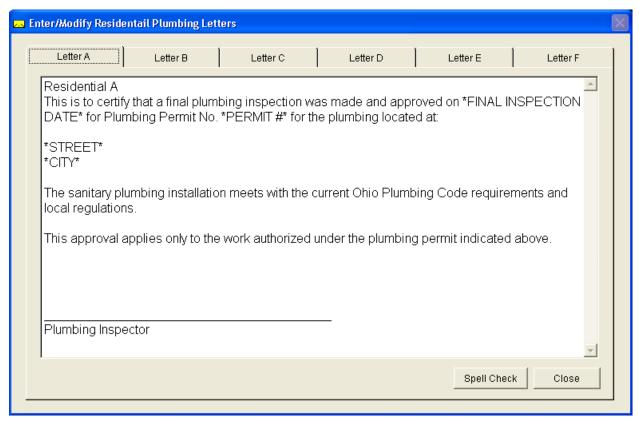
30

| 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 - Residential



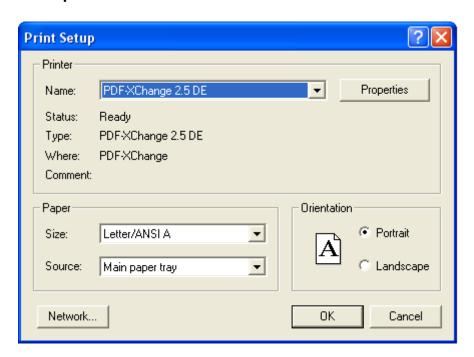


HDIS provides you with the flexibility to write standard letters that can be sent to clients. These letters will pull data through use of the *. The * is placed on each end of the field name that you want to pull into the letter. Use **capital letters** to describe the field name.

Example: *OWNER* = TOM GORDON



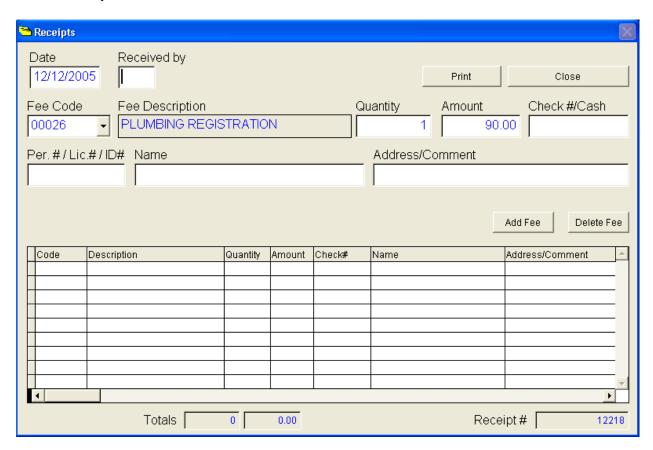
Printer Setup



The print setup allows you to choose from which printer you wish to print. Pick the printer in the name dropdown and click " \mathbf{OK} ".



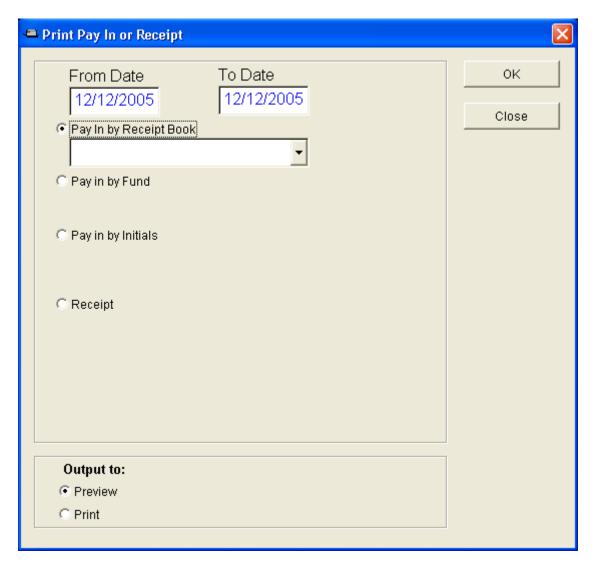
Receipts



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 Residential data entry windows by pressing ALT-R keys.



Receipts Pay In Report



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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Specialist in Comprehensive Health Care Software helpdesk@hdis.org