

HDIS
Health Department Information System
Helping You...Help Others

**Receipts
User Manual**



The Baldwin Group, Inc.

7550 Lucerne Drive

Suite 306

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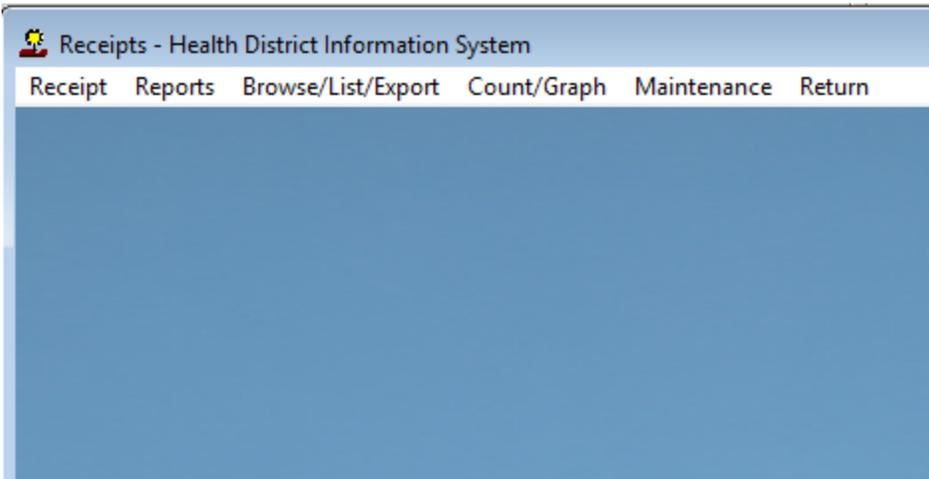
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Chapter 1: Getting Started

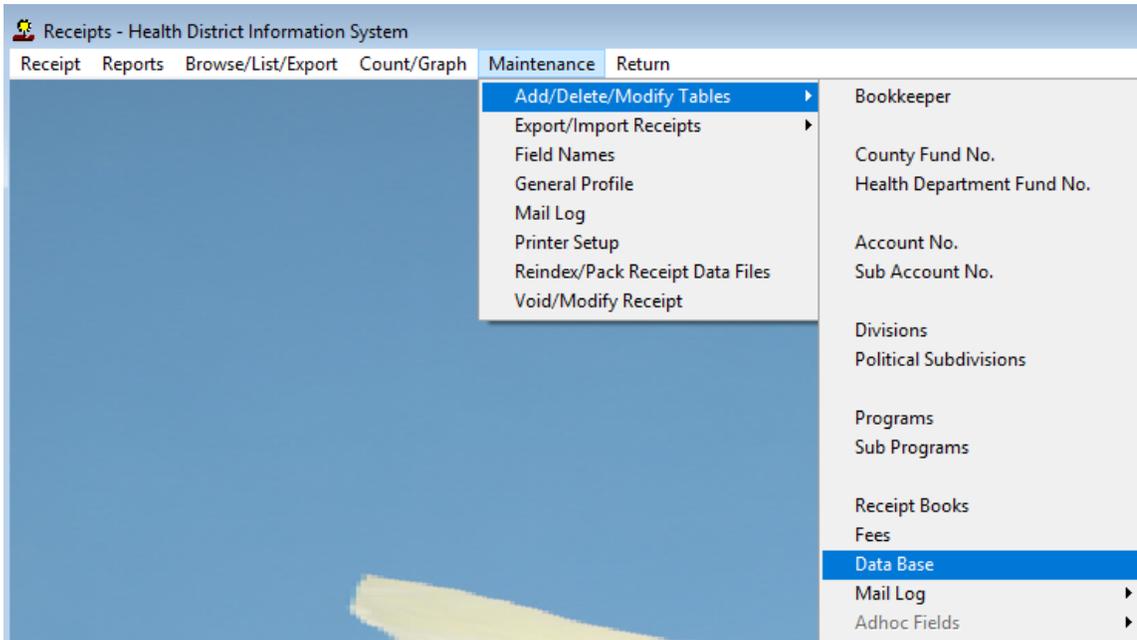
Once the Receipts Control Module has been installed, it can be accessed by going to:
Management Services ->Receipts



Integrating other Modules into Receipts Module

In Receipts go to:

Management Services -> Receipts -> Maintenance -> Add/Delete/Modify Tables ->Data Base



To create a better understanding of this process, the Food Protection module will be used to demonstrate.

Check to see if **your module [Food Protection for example]** is added in “Data Base.”

Notice the field names. The “Code” is pre-determined by HDIS system and creates the connection between the receipts program fee codes and the data base found in a HDIS module.

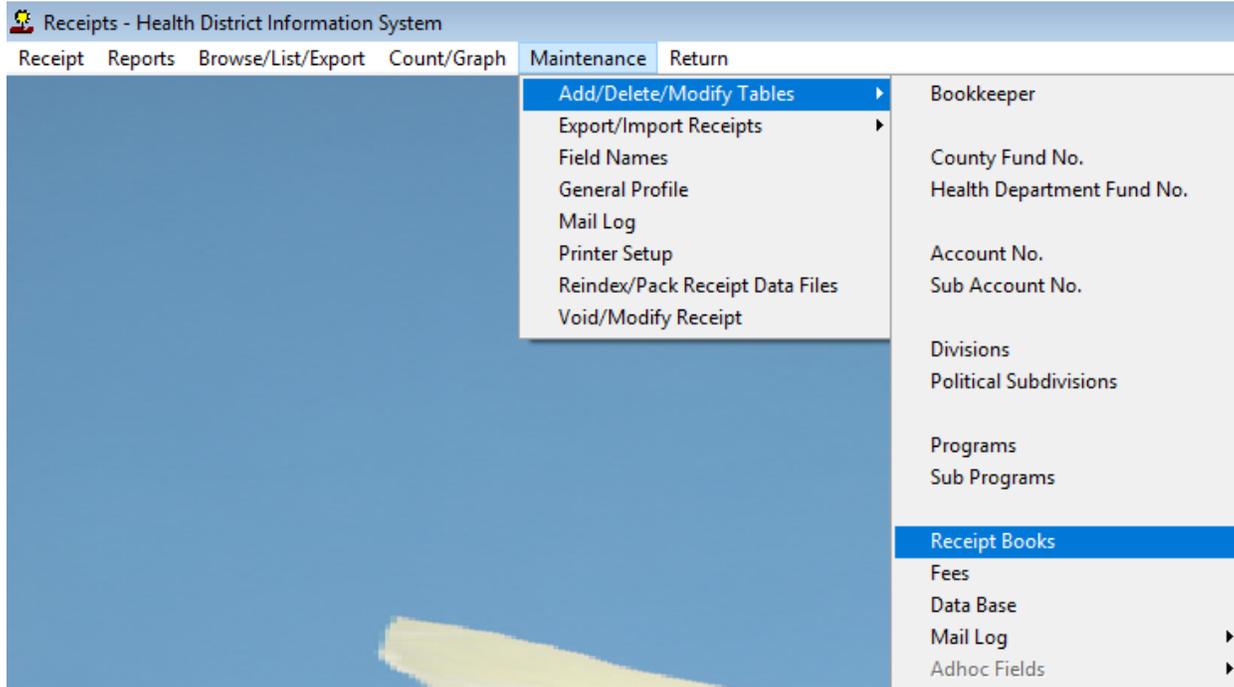
Data Base

The screenshot shows a software window titled "Add/Delete/Modify Data Base Update". It contains a table with two columns: "Code" and "Descript". The table lists various categories such as BIRTH CERTIFICATES, CAMPS, DEATH CERTIFICATES, and SEWAGE DISPOSAL. A red circle highlights the rows for FSC, FSE, FSM, FST, and FSV, which are related to food service. To the right of the table are four buttons: "Close", "Add", "Delete", and "Print".

Code	Descript
BIR	BIRTH CERTIFICATES
CAM	CAMPS
DAY	RESIDENT DAY CAMPS
DEA	DEATH CERTIFICATES
FRF	F50/RFE
FSC	FOOD SERVICE COMMERCIAL
FSE	FOOD ESTABLISHMENT
FSM	FOOD SERVICE MOBILE
FST	FOOD SERVICE TEMPORARY
FSV	FOOD SERVICE VENDING
IMM	IMMUNIZATIONS
MAR	MARINA
MHP	MANUFACTURED HOME PARKS
MOS	MOSQUITO CONTROL
OPB	OPEN BURNING
PLB	RESIDENTIAL PLUMBING
PLC	PLUMBING CONTRACTORS
PLO	COMMERCIAL PLUMBING
POL	POOLS/SPAS/SPECIAL USE POOLS
PWH	PRIVATE WATER HAULER
PWS	PRIVATE WATER SYSTEMS-SAMPLE
PWW	PRIVATE WATER SYSTEMS-WELL
SDO	SEWAGE DISPOSAL-O/M
SDP	SEWAGE DISPOSAL-PERMIT
SDS	SEWAGE DISPOSAL-SITE EVAL
SEC	SEWAGE DISPOSAL-COMMERCIAL
SED	SEWAGE DISPOSAL-DESIGNER
SEE	SEWAGE DISPOSAL-EVALUATOR
SEH	SEWAGE DISPOSAL-HAULERS
SEI	SEWAGE DISPOSAL-INSTALLERS
SEU	SEWAGE DISPOSAL-DEVELOPMENT
SEV	SEWAGE DISPOSAL-SERVICE PROV.

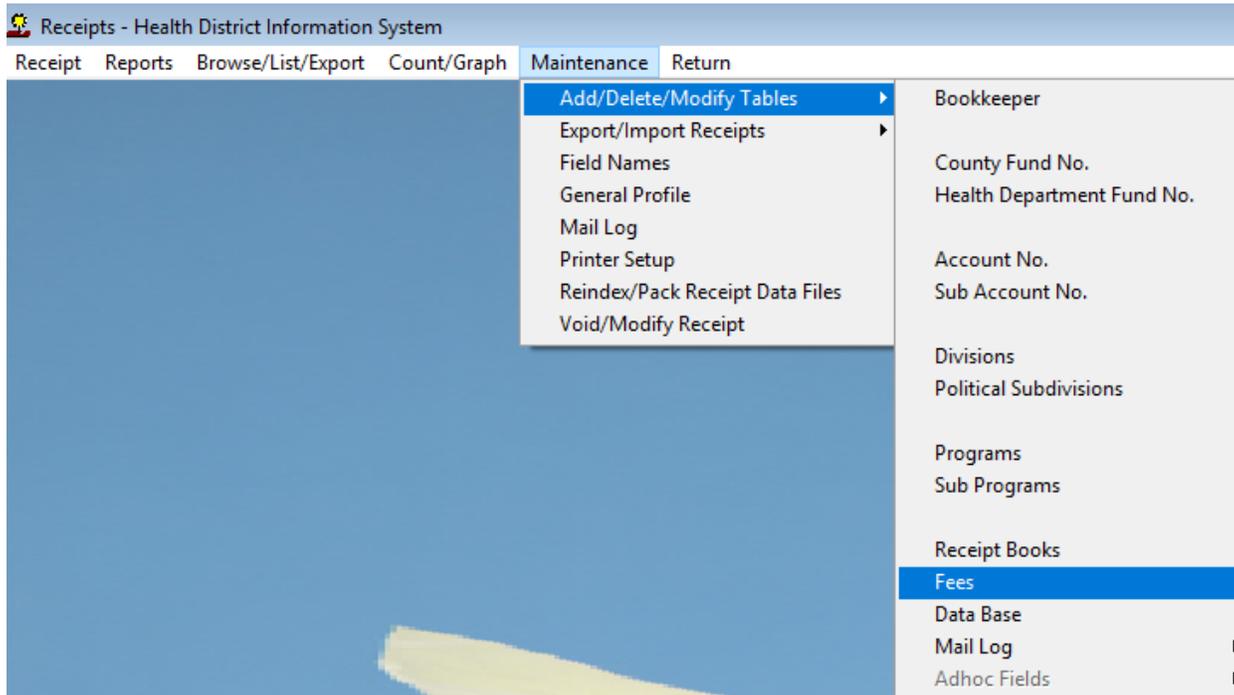
Receipt Books

Go to **Management Services -> Receipts -> Maintenance -> Add/Delete/Modify Tables -> Receipt Books**



Fees

Go to **Management Services -> Receipts -> Maintenance -> Add/Delete/Modify Tables -> Fees**



Field/Button	Description
Code	Enter the fee code (must match the fee codes in the other HDIS modules)
Description	Enter the fee description
Amount	Enter the amount
State Amt.	Enter the state amount
Division	Choose the division for the fee
Program	Choose the program for the fee
Sub Program	Choose the sub program for the fee
Health Dept. Fund No.	Choose the health dept. fund no. for the fee
Account No.	Choose the account no. for the fee
Sub. Account No.	Choose the sub account no. for the fee
Data Base	Choose the data base for the fee

Fee Code	Enter the fee code from the module Fee table
Receipt Book	Choose the receipt book for the fee
Eff. Date	Enter the effective date
HD Regulation	Health Department Regulation #
CPT Code	Enter the CPT code
ICD9 Code	Enter the ICD9 code
Close Button	Closes the table
Add Button	Adds a status to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list
Sort By Code	Click to sort the table by code
Sort By Alpha	Click to sort the table in alphabetical order
Copy & Paste	Right click to copy and past a line

Notice the field names. **Code**, **Data Base**, and **Receipt Book** connect the Receipt module to other modules.

Add/Delete/Modify Receipt Fee Table

Code	Description	Total Amount	State Amt.	Division	Program	Sub Program	Health Department	Fund No.
AIB	ADULT IMMUNIZATIONS - BUCKEYE						0037-2001-14	
AICS	ADULT IMMUNIZATIONS - CS						0037-2001-04	
AII	ADULT IMMUNIZATIONS - INSURANCE						0037-2001-06	
AIM	ADULT IMMUNIZATIONS - MEDICAID						0037-2001-03	
AIMO	ADULT IMMUNIZATIONS - MOLINA						0037-2001-11	
AIP	ADULT IMMUNIZATIONS - PP						0037-2001-01	
AIPA	ADULT IMMUNIZATIONS - PA						0037-2001-15	
AIU	ADULT IMMUNIZATIONS - UHC						0037-2001-13	
BCMh	BCMh						0037-2005-3A	
BCMHD	BCMh DENTIST						0107-2008-3B	
BCMHR	BCMh RDH						0107-2009-3C	
C&DD	C&DD FEES	0.00	0.00				0035-3001-01	
C&DD1	C&DD GROUNDWATER FEE	0.00	0.00				0035-3002-01	
C&DDR	SOLID WASTE PUBLIC RECORD						0035-3001-01	
CAB	CA - BUCKEYE						0037-2011-14	
CACS	CA - CS						0037-2011-04	
CAI	CA - INSURANCE						0037-2011-06	
CAM	CA - MED						0037-2011-03	
CAMO	CA - MOLINA						0037-2011-11	
CAP	CA - PP						0037-2011-01	
CAPA	CA - PA						0037-2011-15	
CAU	CA - UHC						0037-2011-13	
CIB	CH IMM - 18 BUCKEYE						0037-2002-14	
CICS	CH IMM - 18 CARESOURCE						0037-2002-04	

Close
Add
Delete
Print
Sort by Code
Sort by Alpha
Copy & Paste*

In the module you have (such as **Food Protection** for an example) any **Fee** you have listed you have to re-enter into the Receipts module with exact same **Code**. That **Code** is what connects the two modules.

Once a fee has been added to the table, you can begin entering additional fees for the receipt if needed.

When adding in a **Fee** in the **Receipts module**, make sure you pick the correct **Receipt Book** and **Data Base**.

Add/Delete/Modify Receipt Fee Table

Account No.	Sub Account No.	Data Base	Fee Code	Receipt Book	Eff Date	HD Regulation	CPT Code	ICD Code
2003-14				INSURANCE COMPA	//			
3020-01		FRF	C1L	ENVIRONMENTAL	//			
3020-02		FRF	C1S	ENVIRONMENTAL	//			
3020-03		FRF	C2L	DAILY CLINIC RECEIPTS				
3020-04		FRF	C2S	ENVIRONMENTAL				
3020-05		FRF	C3L	GENERAL HEALTH DISTRICT				
3020-06		FRF	C3S	INSURANCE COMPANIES				
3020-06		FRF	C3S	ENVIRONMENTAL	//			
3020-07		FRF	C4L	ENVIRONMENTAL	//			
3020-08		FRF	C4S	ENVIRONMENTAL	//			
3020-4742				ENVIRONMENTAL	//			
2003-06				INSURANCE COMPA	//			
2003-03				INSURANCE COMPA	//			
2003-04				INSURANCE COMPA	//			
2003-11				INSURANCE COMPA	//			
3020-12		FRF		ENVIRONMENTAL	//			
3020-13		FRF	FOT	ENVIRONMENTAL	//			

Close
Add
Delete
Print
Sort by Code
Sort by Alpha

Adding a Receipt

Click on the “**Receipt**” tab to add a receipt.

The screenshot shows a web application window titled "Receipts". At the top, there are two buttons: "Print" and "Close". Below these are input fields for "Date" (12/06/2017) and "Received by". The main form contains several rows of input fields: "Fee Code" (AIB), "Fee Description" (ADULT IMMUNIZATIONS - BUCKEYE), "Quantity" (1), "Amount" (0.00), and "Check #/Cash". Below these are fields for "Per. # / Lic.# / ID#", "Company Name or Client - Last Name First", and "Address/Comment". At the bottom right of the form are "Add Fee" and "Delete Fee" buttons. Below the form is a table with 8 columns: Code, Description, Quan., Amount, Check#, Name, Address/Comment, Per#/Lic#/ID#, and Received of. The table is currently empty. At the bottom of the window, there is a "Totals" section showing "0" for quantity and "0.00" for amount, and a "Receipt #" field showing "300084".

At the top fill in the **Date**, **Received by**, **Fee Code**, **Fee Description**, **Quantity**, **Amount**, **Check #/Cash**, **Per. #/ Lic. #/ ID #**, **Company Name or Client – Last Name First**, and **Address/Comment**.

After filling in everything, click on “**Add Fee.**” This will add the Fee to the records.

You can see Totals at the bottom to show the Total number of receipts you added and the amount. Also, the **Receipt number** is displayed at the bottom right.

Once finished you can either click “**Print**” or “**Close.**”

Chapter 2: Reports

Reports



The reports menu contains a list of reports that you are able to obtain from the program.

For each report that you run the menu above will appear. Enter in the **“From date”** and **“To date”** to create a range of receipts for your report. You can apply **“Filters”** on the report by clicking the **“Filters”** button. Select the appropriate **“Output to:”** option; such as **“Preview”** or **“Print.”** When finished click **“OK.”**

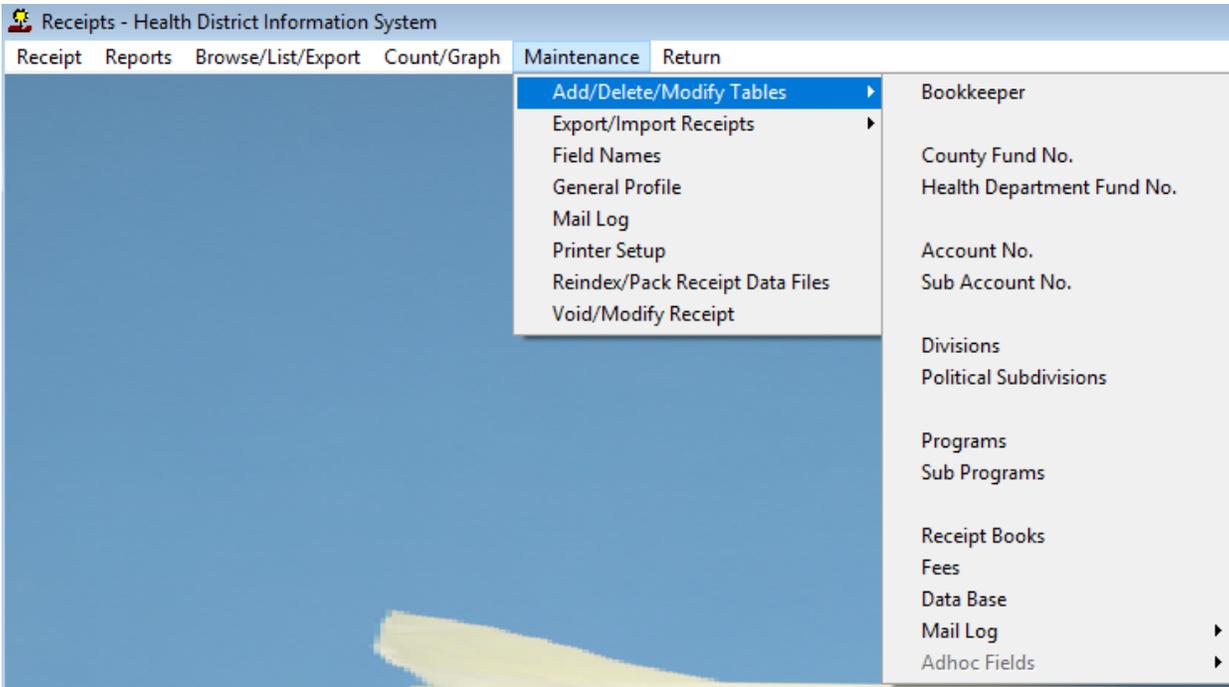
Report	Description
By Account No. (detail)	Prints a list of all receipts grouped by the account numbers
By Account No. (summary)	Prints a summary of the totals for all account numbers
By County Fund No. (detail)	Prints a list of all receipts grouped by the county fund numbers
By County Fund No. (summary)	Prints a summary of the totals for all county fund numbers
By County Fund No. by Health Dept. Fund (summary)	Prints a list of receipts grouped by county fund number with health dept. fund numbers
By Division (summary)	Prints a summary of the totals for all divisions
By Fee Code (detail)	Prints a list of all receipts grouped by the fee code
By Fee Code (summary)	Prints a summary of the totals for all fee codes
By Health Dept. Fund (detail)	Prints a list of all receipts grouped by the health dept. fund no.
By Health Dept. Fund (summary)	Prints a summary of the totals for health dept. fund no.

By Health Dept. Fund (YTD Summary)	Prints a summary for the year to date totals by health dept. fund no.
By Program (detail)	Prints a list of all receipts grouped by the program
By Program (summary)	Prints a summary of the totals for all programs
By Receipt Book (detail)	Prints a list of all receipts grouped by receipt books
By Receipt Book (summary)	Prints a summary of the totals for all receipt books
By Receipts (detail)	Prints a list of all receipts by receipt #
By Receipts (summary)	Prints a summary list of all receipts
By Sub. Account No. (detail)	Prints a list of all receipts grouped by sub account number
By Sub. Account No. (summary)	Prints a summary of the totals for all sub account numbers
By Sub Program (detail)	Prints a list of all receipts grouped by the sub program
By Sub Program (summary)	Prints a summary of the totals for all sub programs
Receipts Pay In Report	Prints a Pay In report
By Account No. (detail)	Prints a list of all receipts grouped by the account numbers

Chapter 3: Maintenance – Add/Delete/Modify Tables

Maintenance

The maintenance menu contains setup tools that drive the Receipt module.



This section is important because it helps integrate other modules into working with the Receipt module.

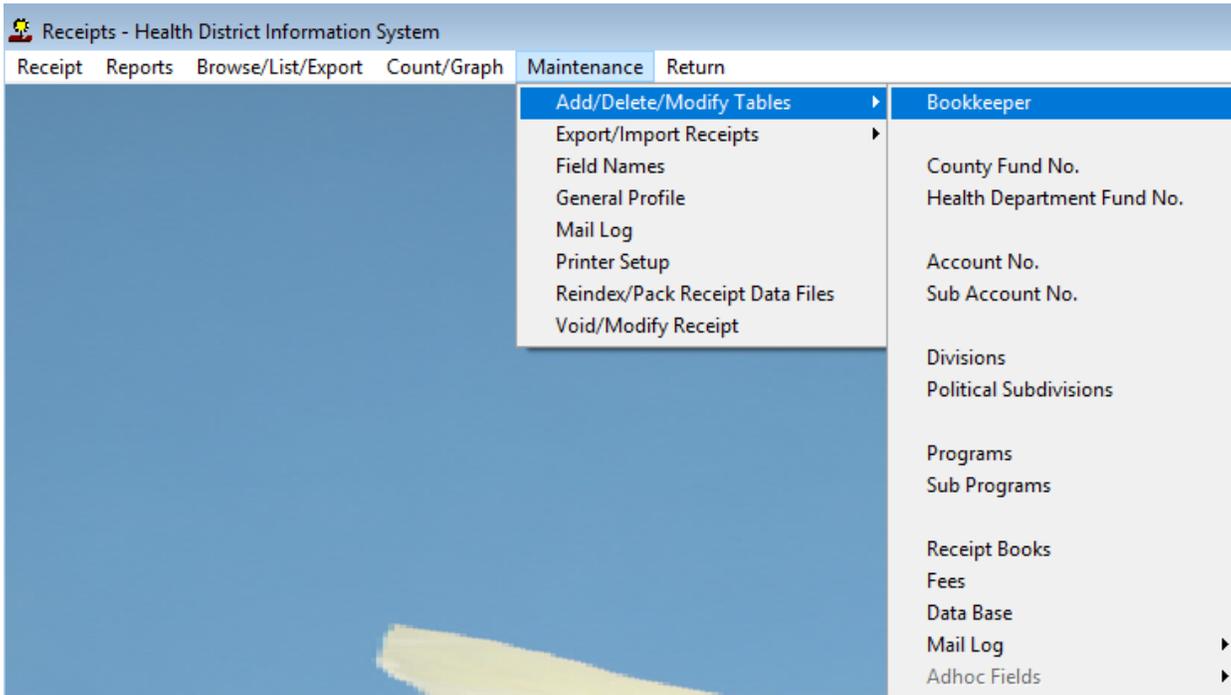
Chapter 1 Getting Started explains how to integrate another module – While this Chapter explains more in depth the other features.

Receipt Books, Fees, and Data Base are discussed in **Chapter 1**

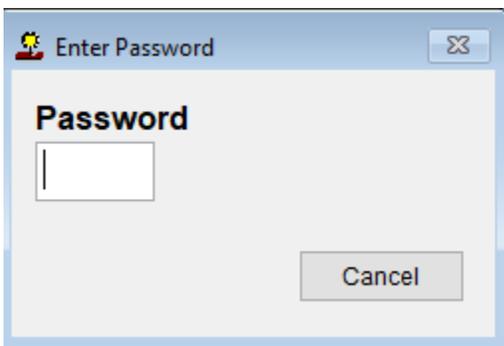
Modifying this section early will make entering receipts easier and connect the other modules you are using.

Bookkeeper

Navigate to Maintenance -> Add/Delete/Modify Tables -> Bookkeeper



After clicking on "Bookkeeper" a window should pop up to enter a password. Enter the password.



After entering the correct password another window should pop up.

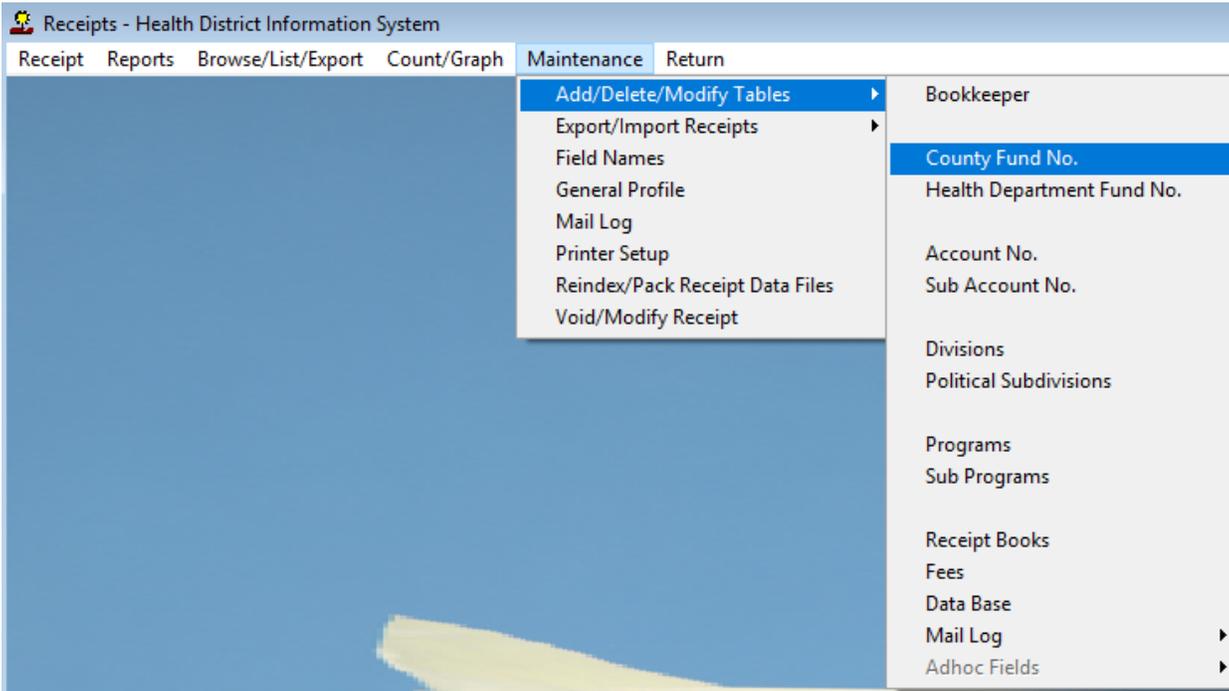
Date	Receipt#	Name	Comment
01/17/2017	148888	MONKEY BONES TATTOO, LLC	3361 DAYTON XENIA ROAD
01/17/2017	148889	VOID	
01/17/2017	148890	SWIFTY'S SWEETS & TREATS	86 W. WASHINGTON STREET
01/17/2017	148891	KEN SHELTON	428 DARST RD
01/18/2017	148892	KEN SHELTON	3305 INDIAN RIPPLE RD
12/01/2017	148893	ANDRE JOSEPH	TEST KAYLE
12/01/2017	148894	ALL ABOUT CHOCOLATE GRASSHOPP	226 SOUTH NORTH STREET
12/01/2017	148895	KAYKAY TEST TEST	123 KAYTEST ROAD
12/01/2017	148896	GABBY TREATS	12 GABBY WAY
12/01/2017	148897	GABBY TREATS	12 GABBY WAY
12/06/2017	148898	SHOPPER'S QUICKMART # 47	47 UPPER LOWER BLVD

This area shows all recorded receipts that have been entered.

If you are unsure if a receipt was properly entered you can go to Bookkeeper to double check.

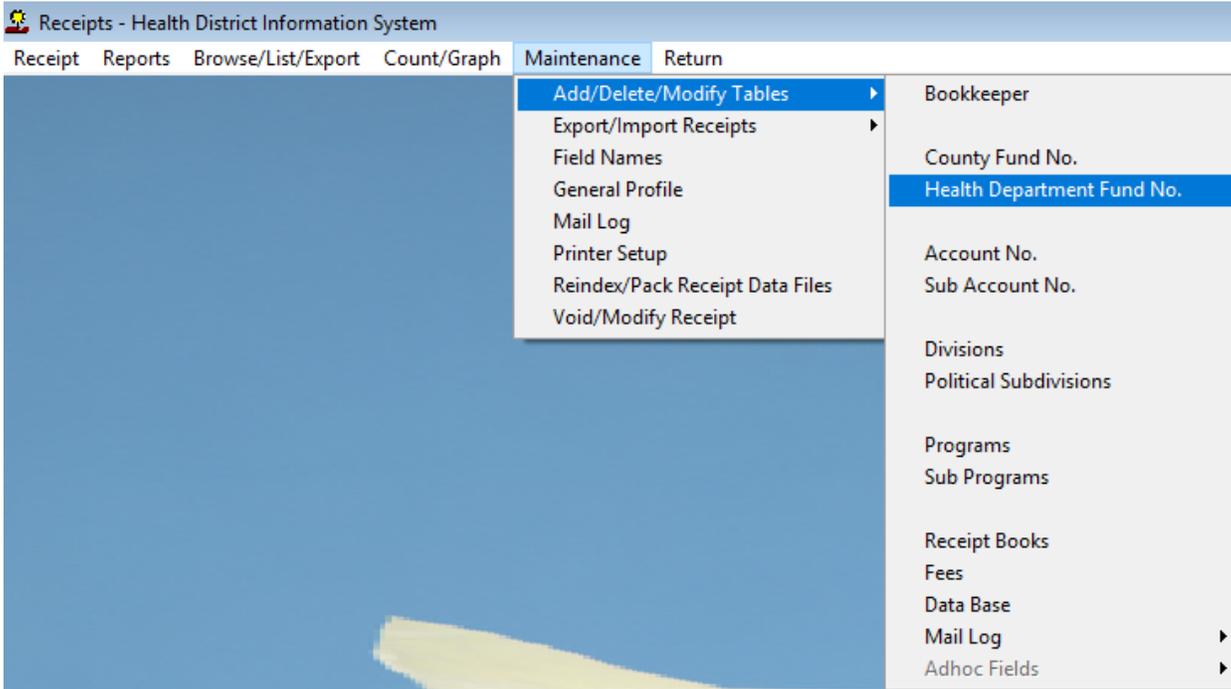
County Fund

Navigate to **Maintenance -> Add/Delete/Modify Tables -> County Fund No.**



Health Department Fund No.

Navigate to **Maintenance -> Add/Delete/Modify Tables -> Health Department Fund No.**



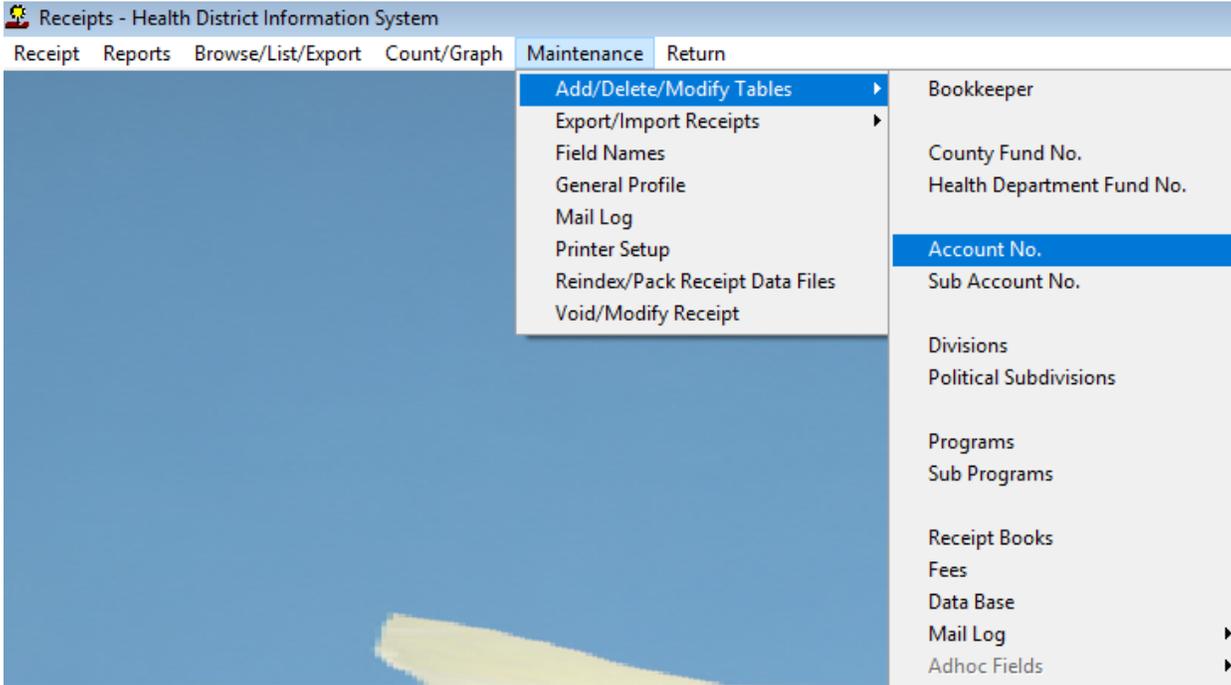
The screenshot shows a window titled "Add/Delete/Modify" with a table and several buttons. The table has three columns: "Health Dept. Fund No.", "Description", and "County Fund No.". The first row is highlighted in blue. To the right of the table are buttons for "Close", "Add", "Delete", and "Print". Below these are three sorting options: "Sort by H.D.Fund No.", "Sort by Description", and "Sort by County Fund No.".

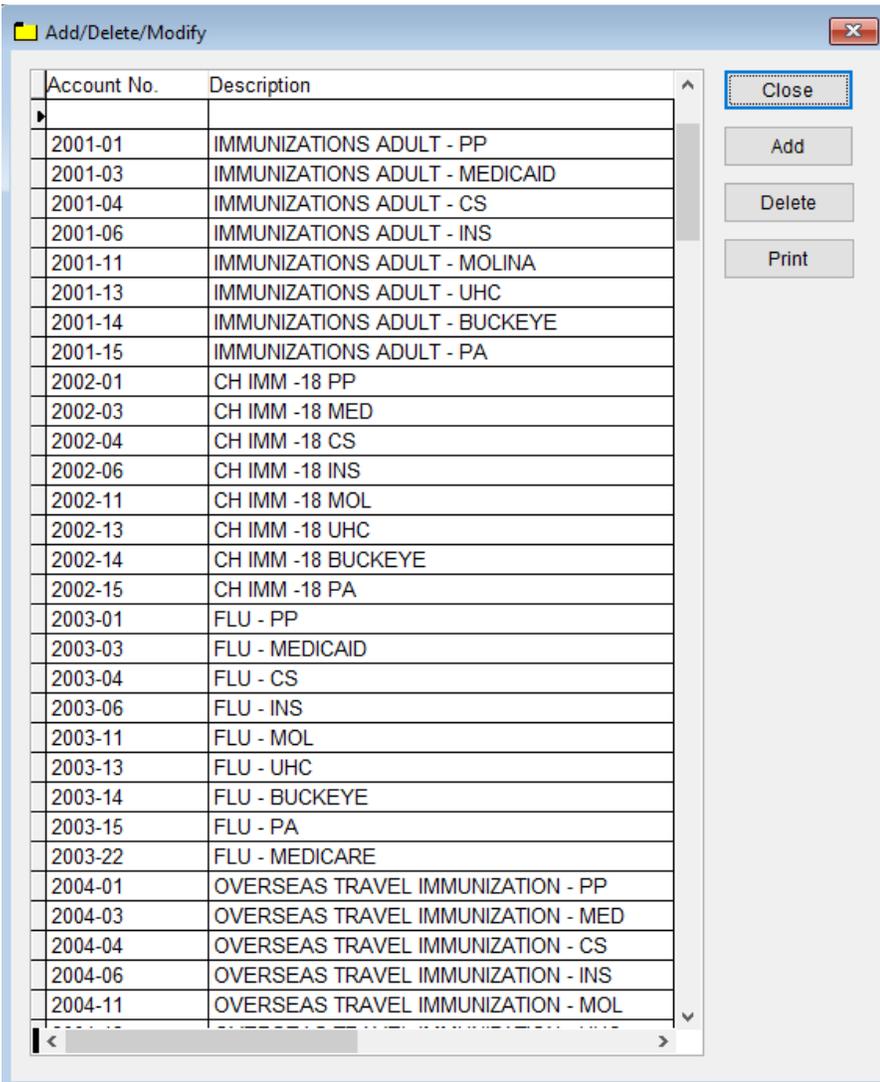
Health Dept. Fund No.	Description	County Fund No.
0035-3001-01	C&DD FEES	0035
0035-3001-02	SOLID/INFECTIOUS WASTE LICENSE	0035
0035-3002-01	GROUNDWATER MONITORING C&DD	0035
0035-301-4742	SOLID WASTE - PUBLIC RECORDS	0035
0036-3003-01	WATER - NEW PERMIT RESIDENTIAL	0036
0036-3003-02	WATER - NEW PERMIT COMMERCIAL	0036
0036-3003-03	WATER - ALTERATION PERMIT	0036
0036-3003-05	WATER - ODNR NEW PERMIT	0036
0036-3003-07	WATER - SEALING PERMIT	0036
0036-3003-10	WATER - SAMPLE	0036
0036-3003-17	WATER - HAULING VEHICLE	0036
0036-3003-18	WELL VARIANCE	0036
0036-3003-19	WATER SYSTEM CONTRACTOR FEE	0036
0036-3003-22	WATER - CERTIFICATION	0036
0036-3003-4742	WATER - PUBLIC RECORDS	0036
0037-2001-01	IMMUNIZATIONS ADULT - PP	0037
0037-2001-03	IMMUNIZAITONS ADULT - MED	0037
0037-2001-04	IMMUNIZATIONS ADULT - CS	0037
0037-2001-06	IMMUNIZATIONS ADULT - INS	0037
0037-2001-11	IMMUNIZATIONS ADULT - MOL	0037
0037-2001-13	IMMUNIZATIONS ADULT - UHC	0037
0037-2001-14	IMMUNIZAITONS ADULT - BUCKEYE	0037
0037-2001-15	IMMUNIZATIONS ADULT - PA	0037
0037-2002-01	CHILDHOOD IMM - 18-PP	0037

Field/Button	Description
Health Dept. Fund No.	Enter the health dept. fund No. (can be same as county fund number)
Description	Enter the description for the fund No.
County Fund No.	Choose the county fund No.
Close Button	Closes the table
Add Button	Adds a row to the table
Delete Button	Deletes a highlighted entry

Account No.

Navigate to **Maintenance -> Add/Delete/Modify Tables -> Account No.**

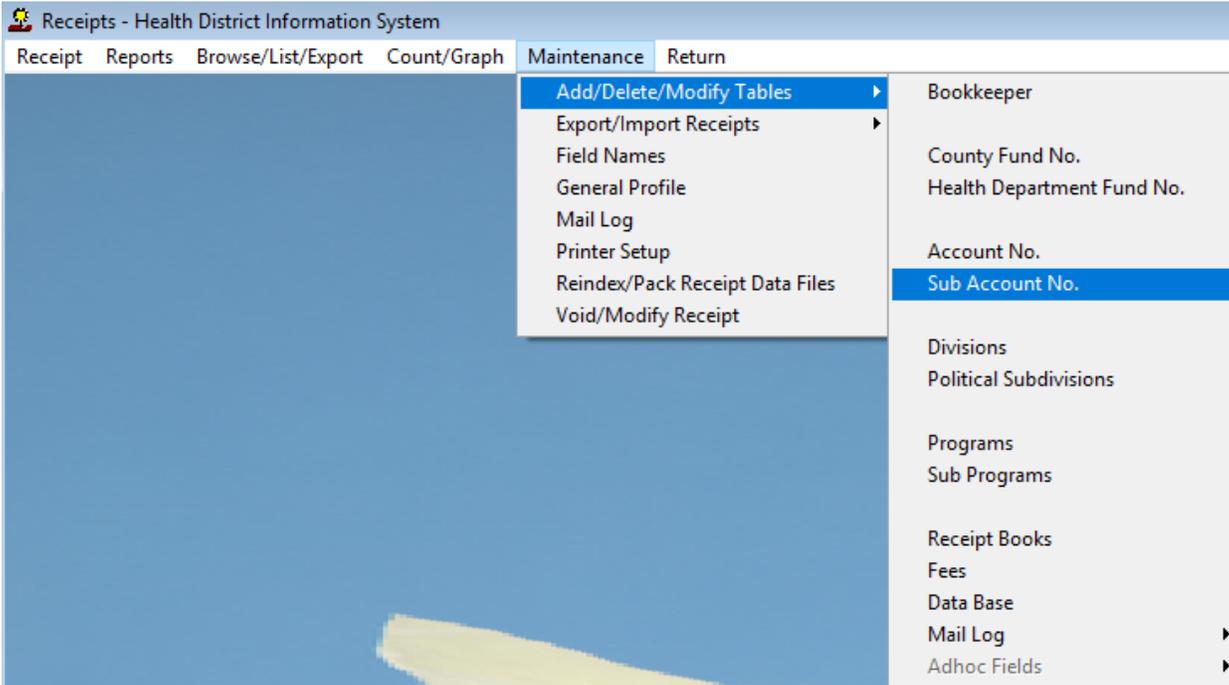


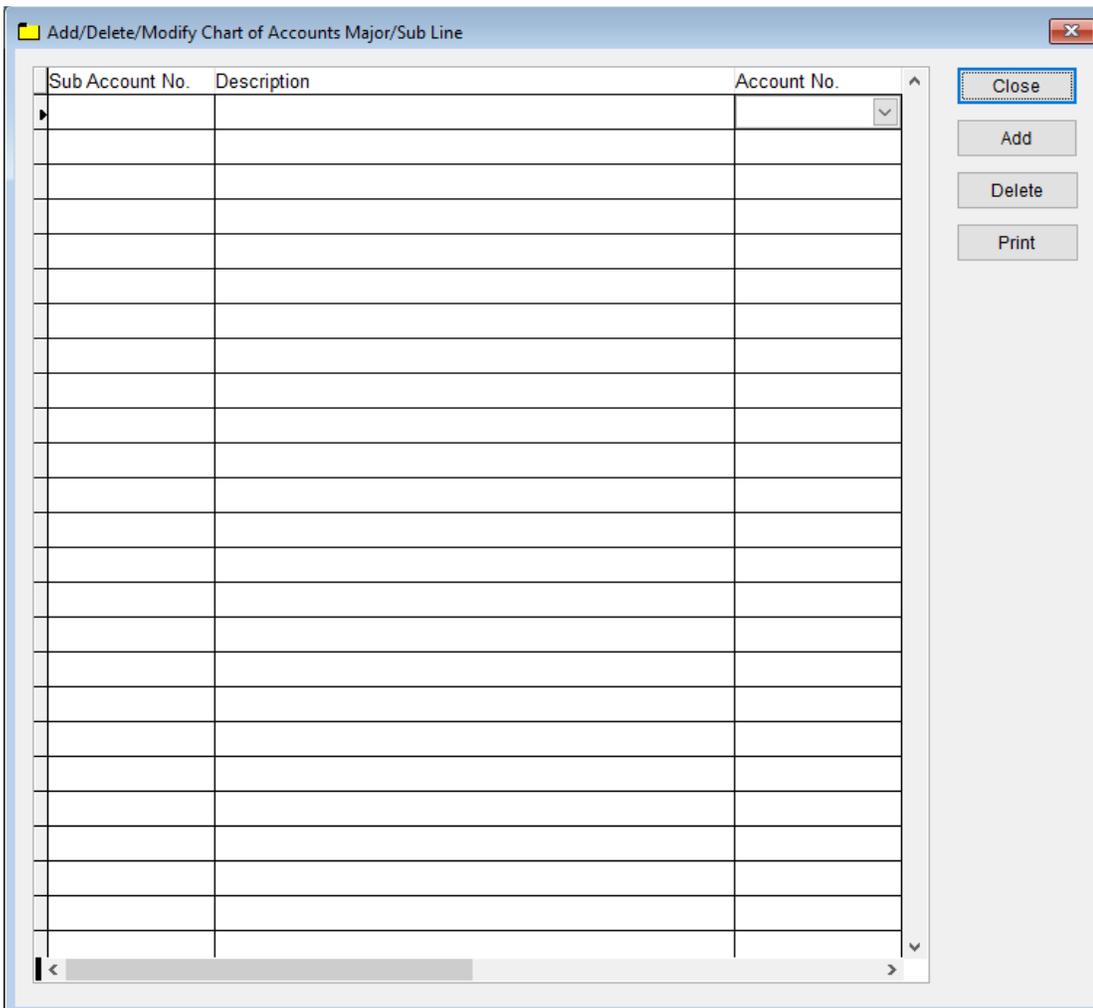


Field/Button	Description
Account No.	Enter the account number
Description	Enter the description for the account No.
Close Button	Closes the table
Add Button	Adds a row to the table
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Sub Account No.

Navigate to **Maintenance -> Add/Delete/Modify Tables -> Sub Account No.**

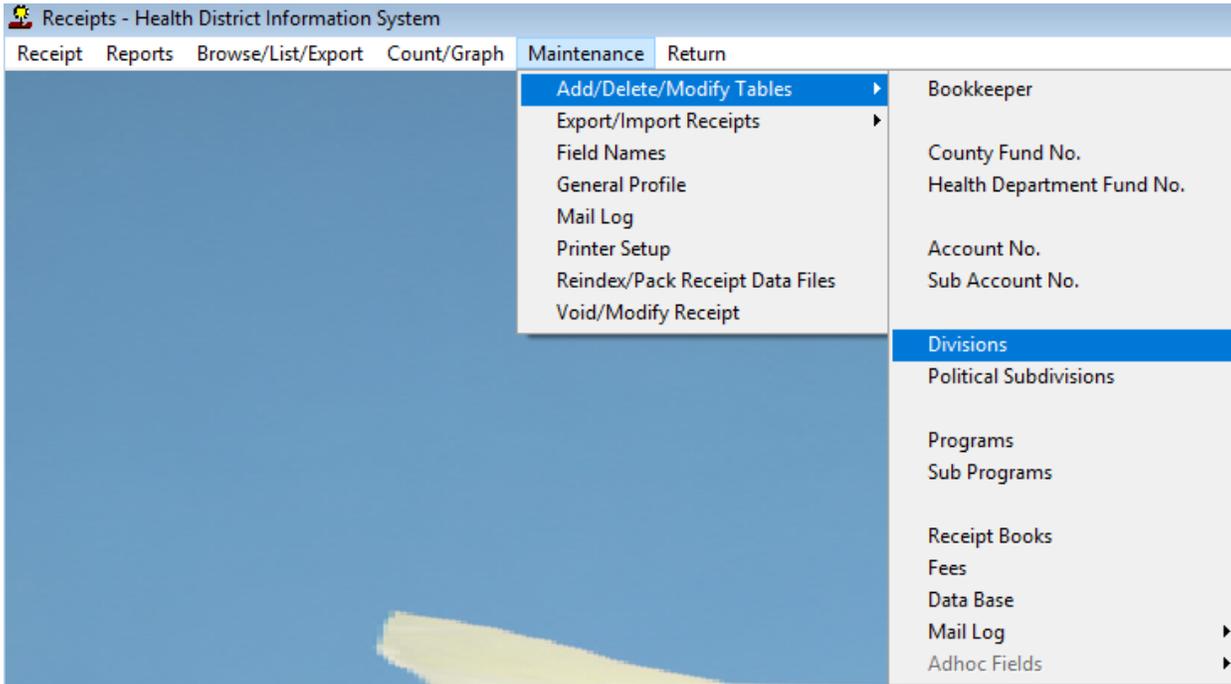


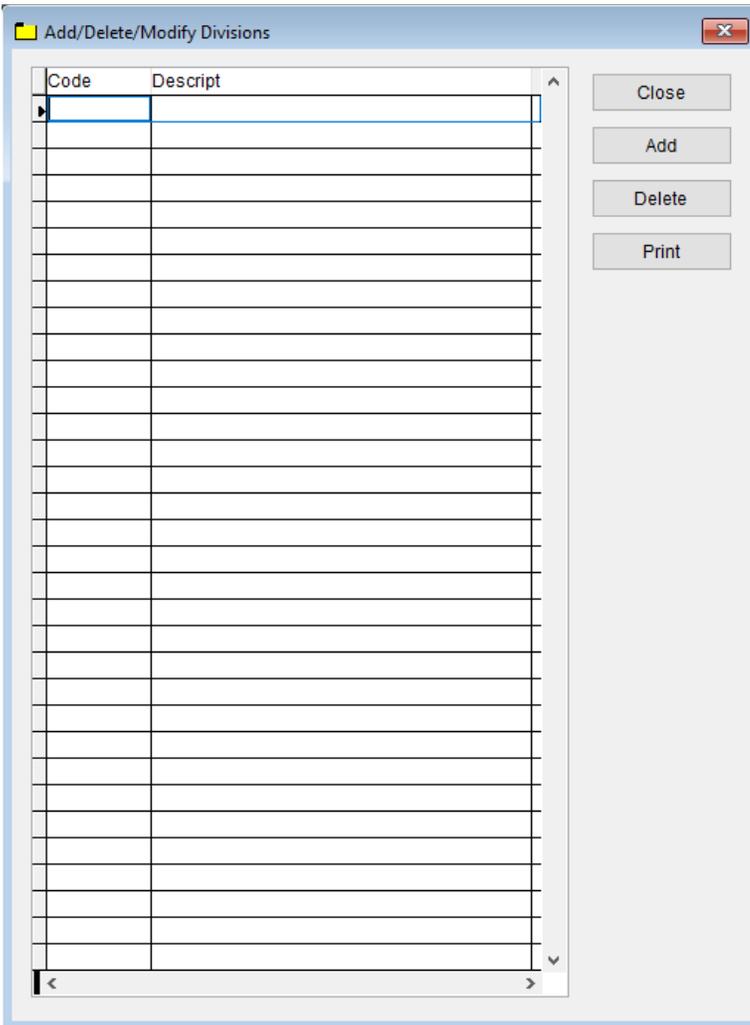


Field/Button	Description
Sub Account No.	Enter the sub account No.
Description	Enter the description for the sub account No.
Account No.	Sub Account is a subset of an Account number
Close Button	Closes the table
Add Button	Adds a row to the table
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Divisions

Navigate to **Maintenance -> Add/Delete/Modify Tables -> Divisions**

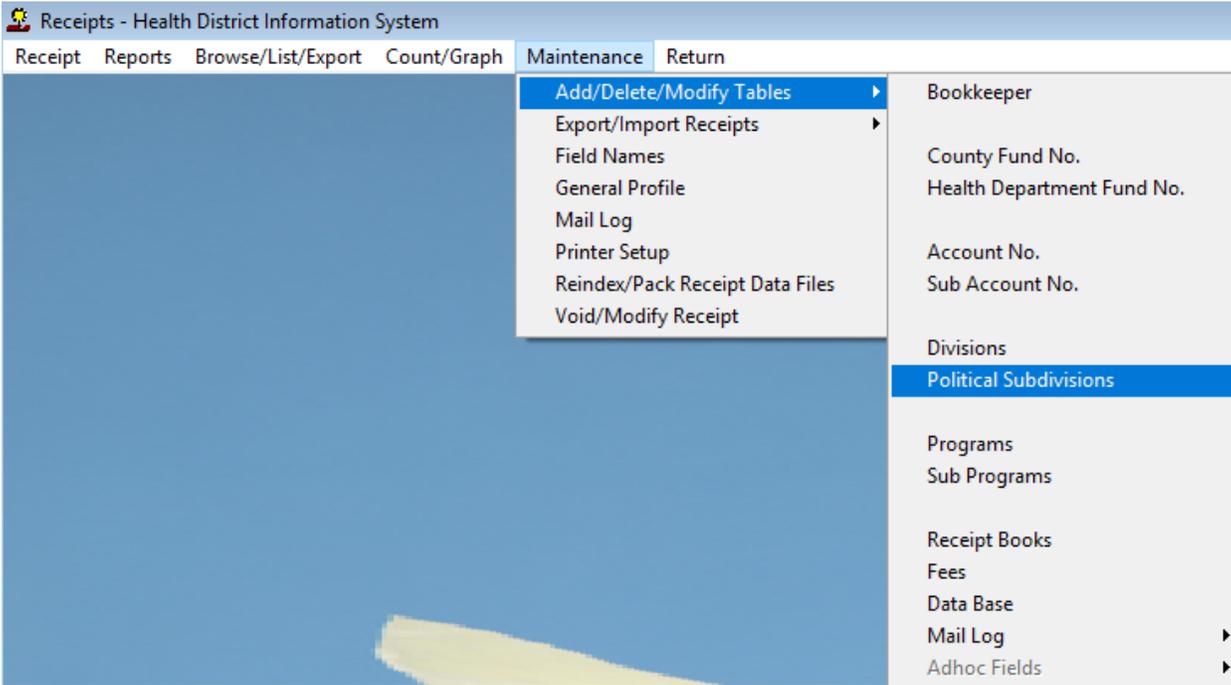


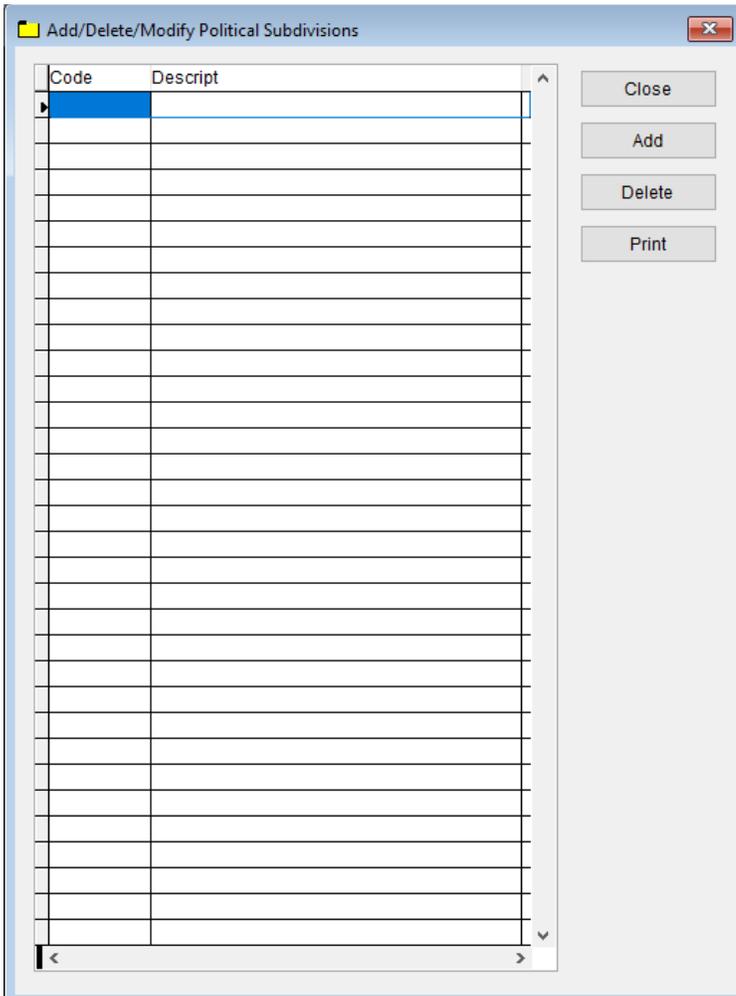


Field/Button	Description
Code	Enter the division code
Descript	Enter the division description
Close Button	Closes the table
Add Button	Adds an employee to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Political Subdivisions

Navigate to **Maintenance -> Add/Delete/Modify Tables -> Political Subdivisions**

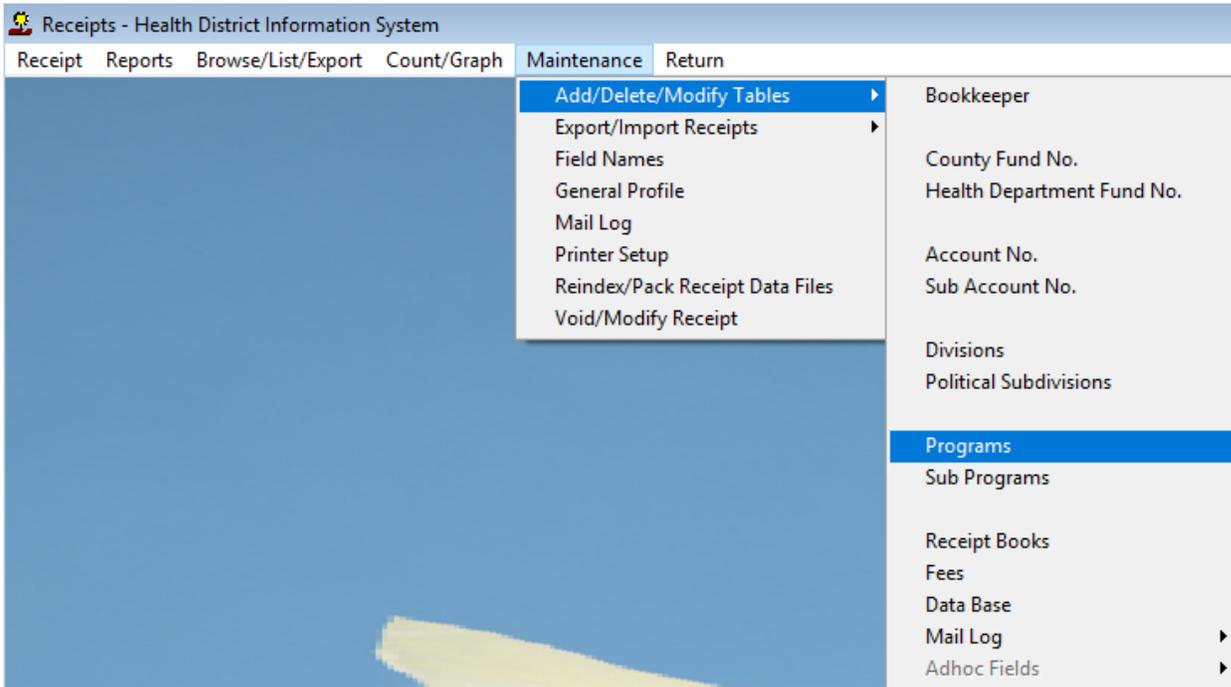


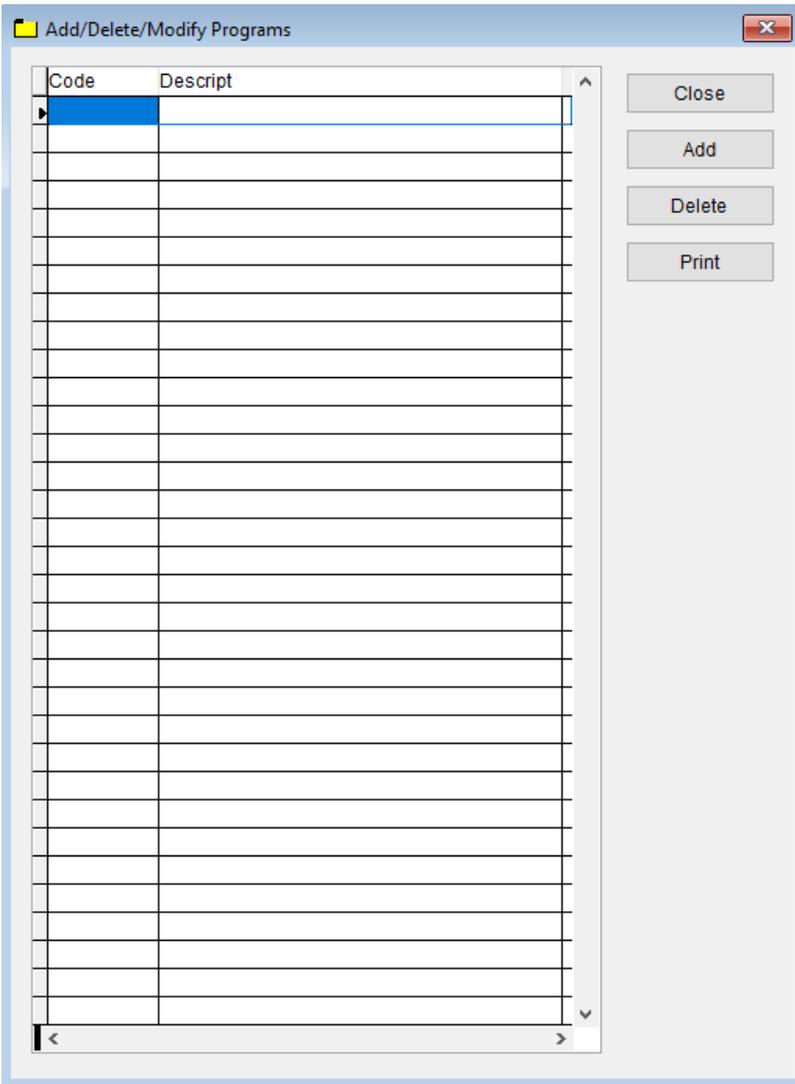


Field/Button	Description
Code	Enter the code
Name	Enter the political subdivision name
Close Button	Closes the table
Add Button	Adds a name to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Programs

Navigate to **Maintenance -> Add/Delete/Modify Tables -> Programs**

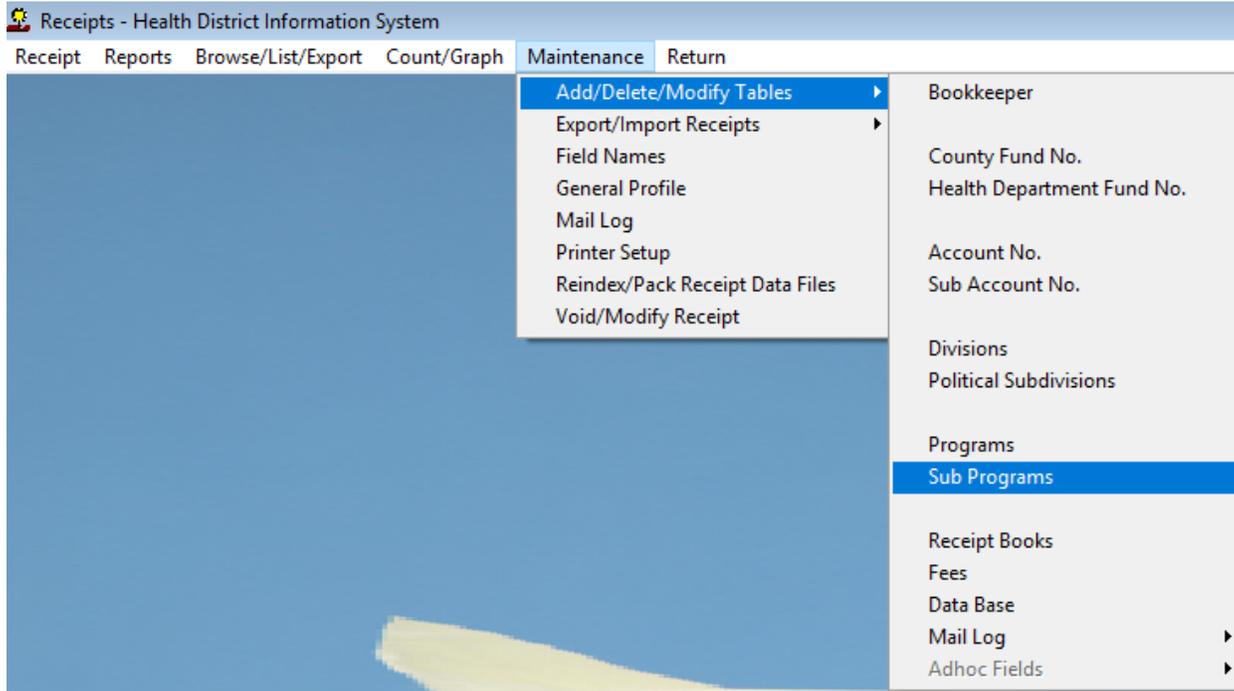




Field/Button	Description
Code	Enter the code
Descript	Enter the program name
Close Button	Closes the table
Add Button	Adds a name to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

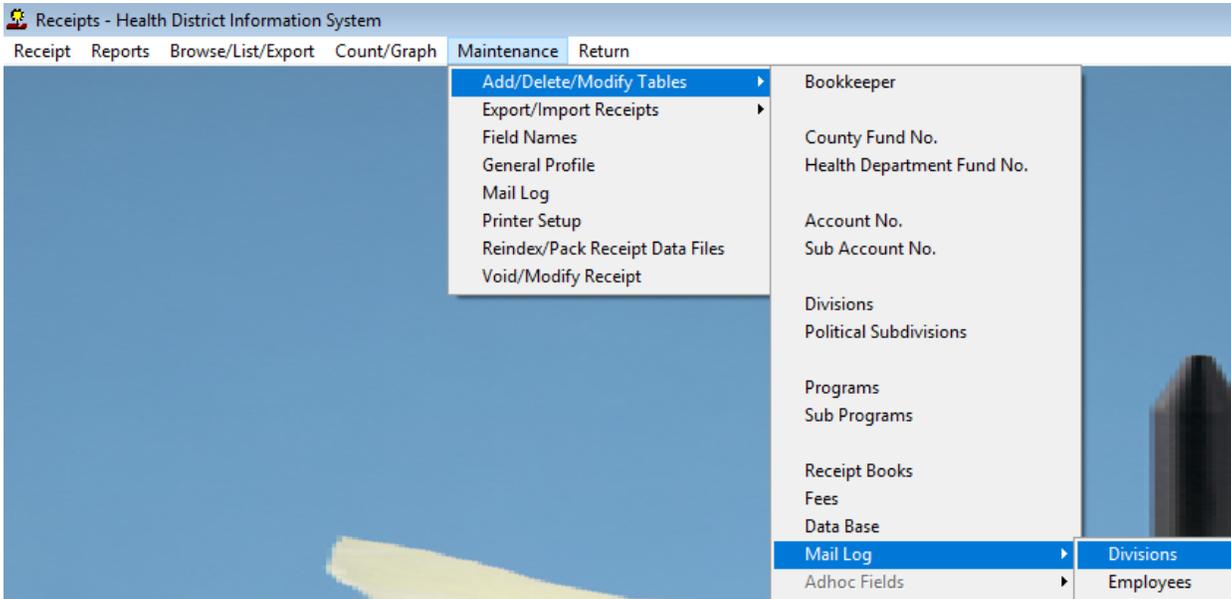
Sub Programs

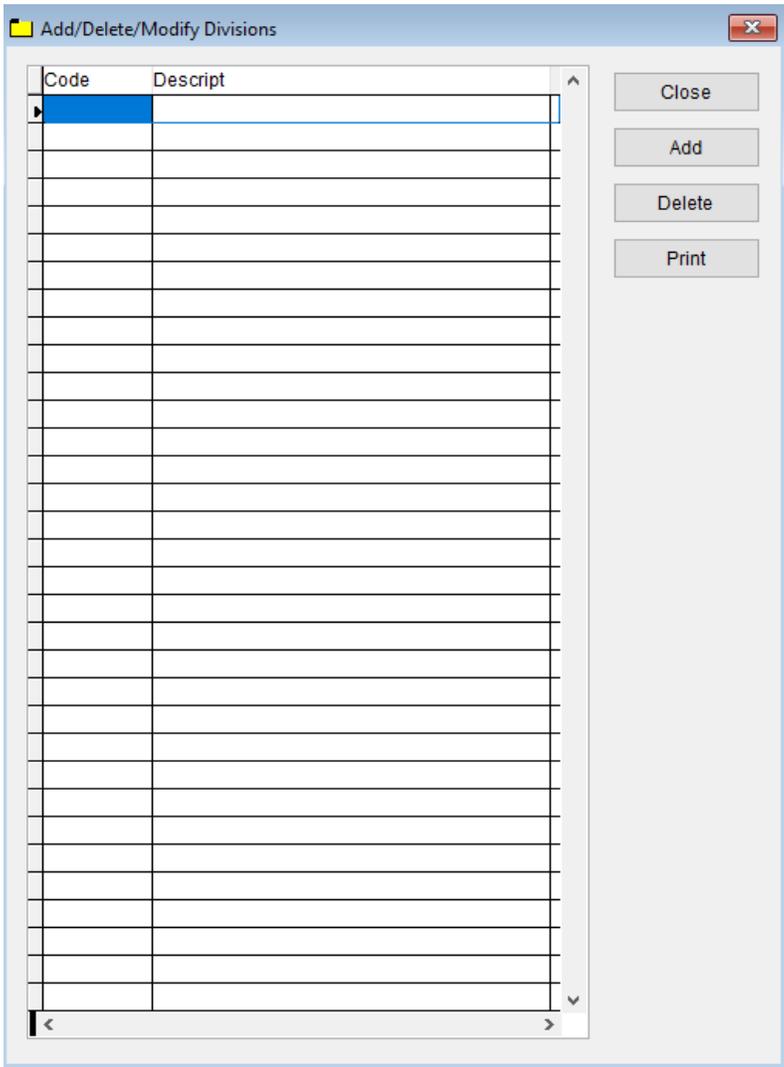
Navigate to **Maintenance -> Add/Delete/Modify Tables -> Sub Programs**



Mail Log – Divisions

Navigate to **Maintenance -> Add/Delete/Modify Tables -> Mail Log -> Divisions**

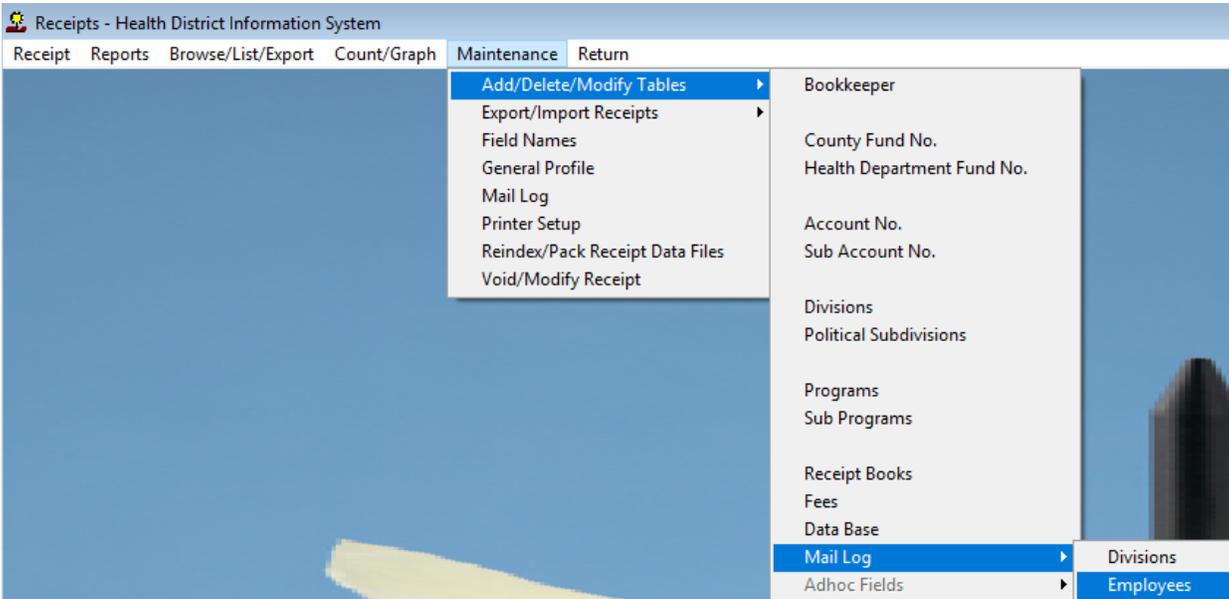


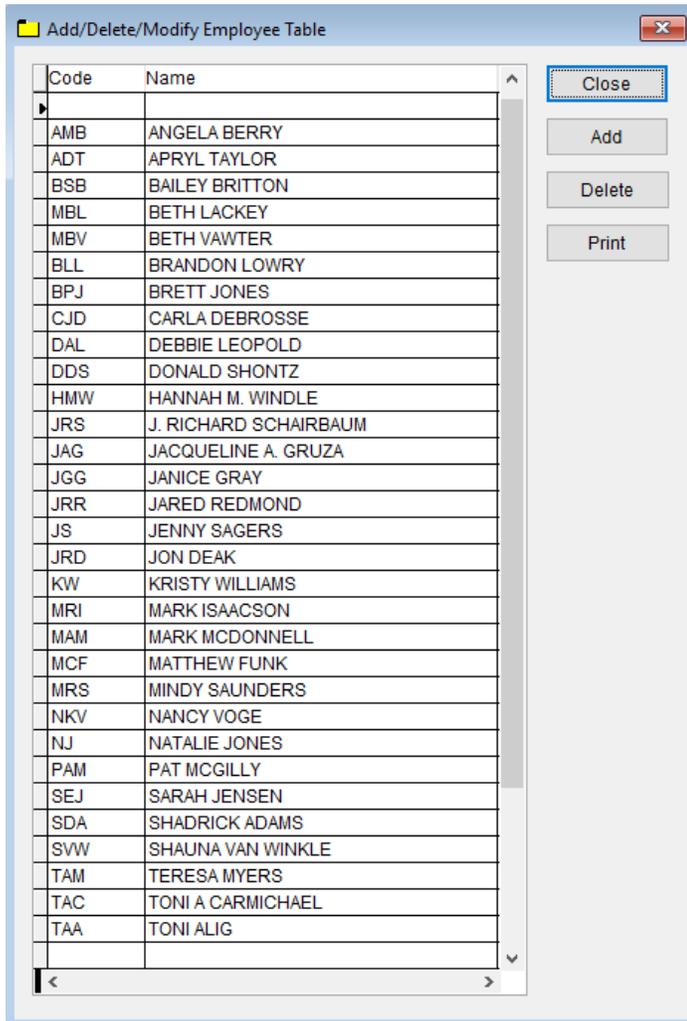


Field/Button	Description
Code	Enter the division code
Descript	Enter the description of the division
Close Button	Closes the table
Add Button	Adds a division to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Mail Log – Employees

Navigate to **Maintenance -> Add/Delete/Modify Tables -> Mail Log -> Employees**



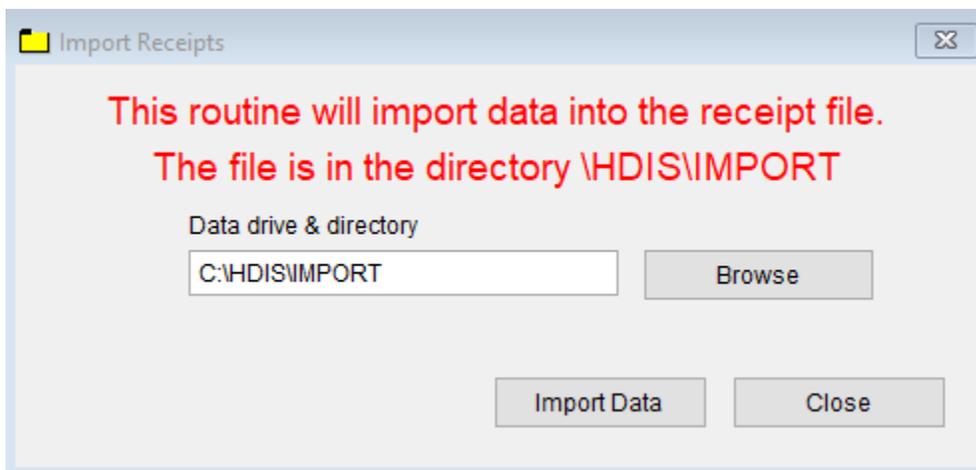
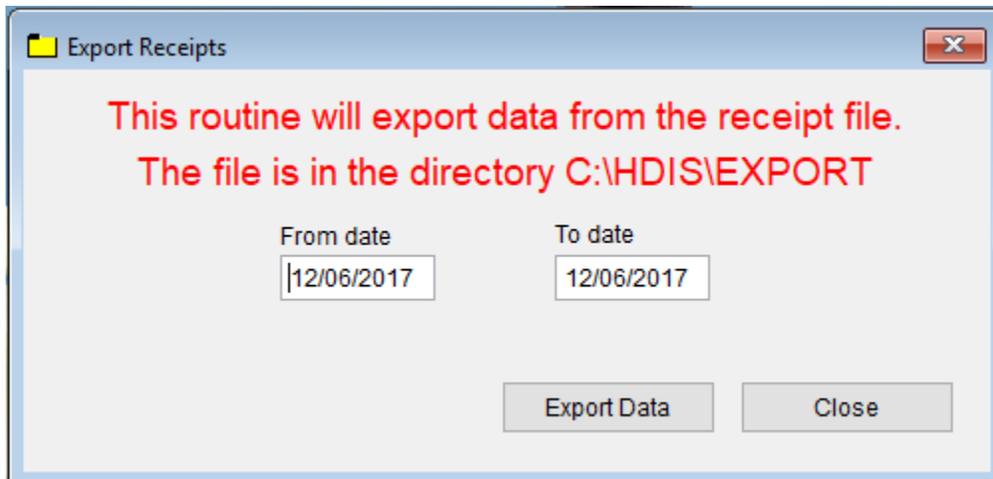
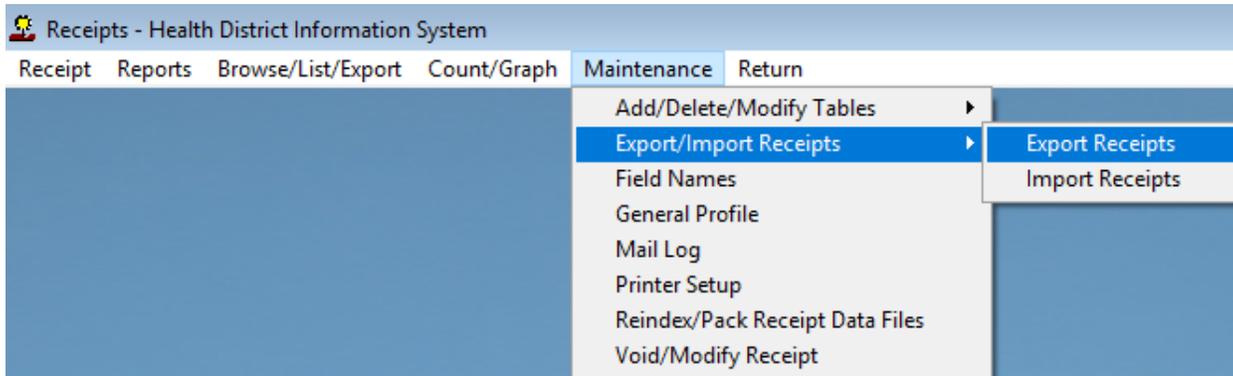


Field/Button	Description
Code	Enter the employee's code
Name	Enter the employee's name
Close Button	Closes the table
Add Button	Adds an employee to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Export/Import Receipts

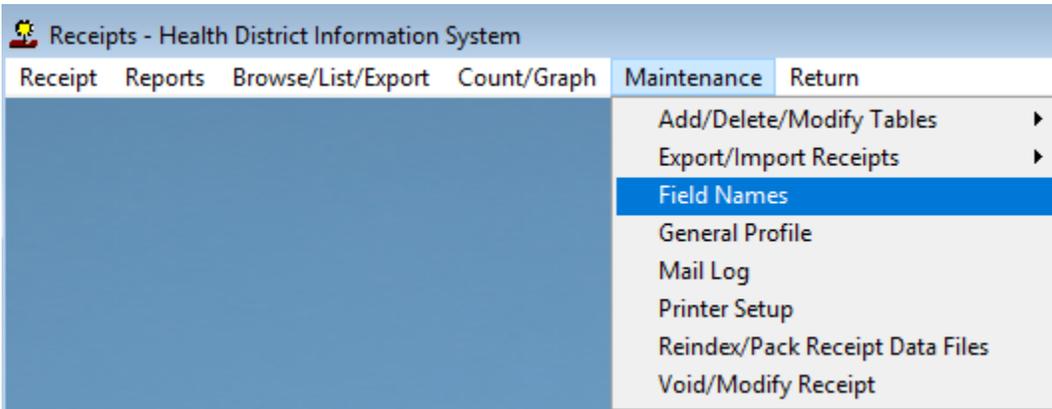
Navigate to **Maintenance -> Export/Import Receipts**

The Export/Import function enables you to take your receipts data out of the office on your laptop.



Field Names

Navigate to **Maintenance -> Field Names**

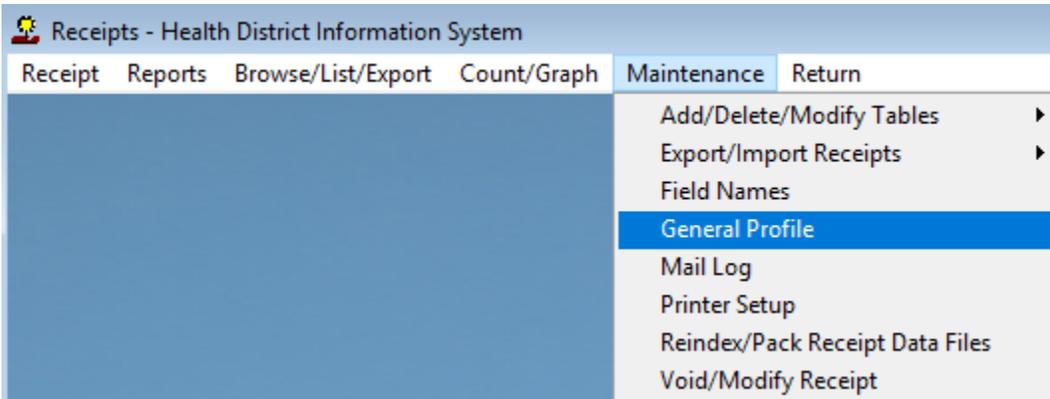


Field names are available for programmers or for Browse/List/Export functions.

General Profile

Navigate to **Maintenance -> General Profile**

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



The 'General Profile' form is displayed with the following data:

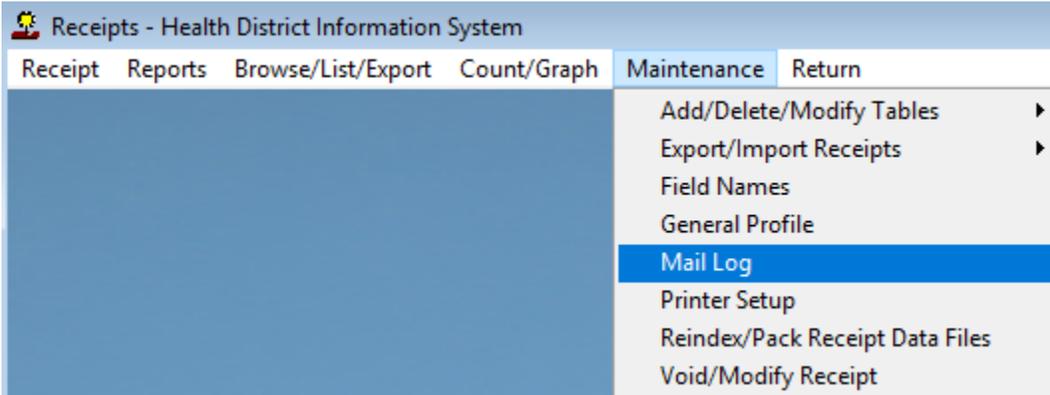
- Demographics** (selected tab)
- General** sub-tab
- Health Department**: BGI HD
- City**: Middleburg Heights
- Division**: (empty)
- State**: OH
- Address1**: 7550 Lucerne Drive
- Zip**: 44130
- Address2**: (empty)
- County**: Kayle
- Phone #'s**: 1-440-891-9100
- FAX #**: 1-440-891-9458
- Federal Tax ID**: ADFA
- Commissioner**: Doc Darrell
- Client/Server Location**: M:\HDIS\DATA
- Email**: ADFASD
- Make Checks Payable to**: ADSF
- View Archives**:

<input type="checkbox"/> 2017	<input type="checkbox"/> 2016	<input type="checkbox"/> 2015	<input type="checkbox"/> 2014	<input type="checkbox"/> 2013	<input type="checkbox"/> 2012	<input type="checkbox"/> 2011	<input type="checkbox"/> 2010	<input type="checkbox"/> 2009	<input type="checkbox"/> 2008
<input type="checkbox"/> 2007	<input type="checkbox"/> 2006	<input type="checkbox"/> 2005	<input type="checkbox"/> 2004	<input type="checkbox"/> 2003	<input type="checkbox"/> 2002	<input type="checkbox"/> 2001	<input type="checkbox"/> 2000	<input type="checkbox"/> 1999	<input type="checkbox"/> 1998

Buttons: **Cancel**, **Close**. Legend: *** - Required Fields**

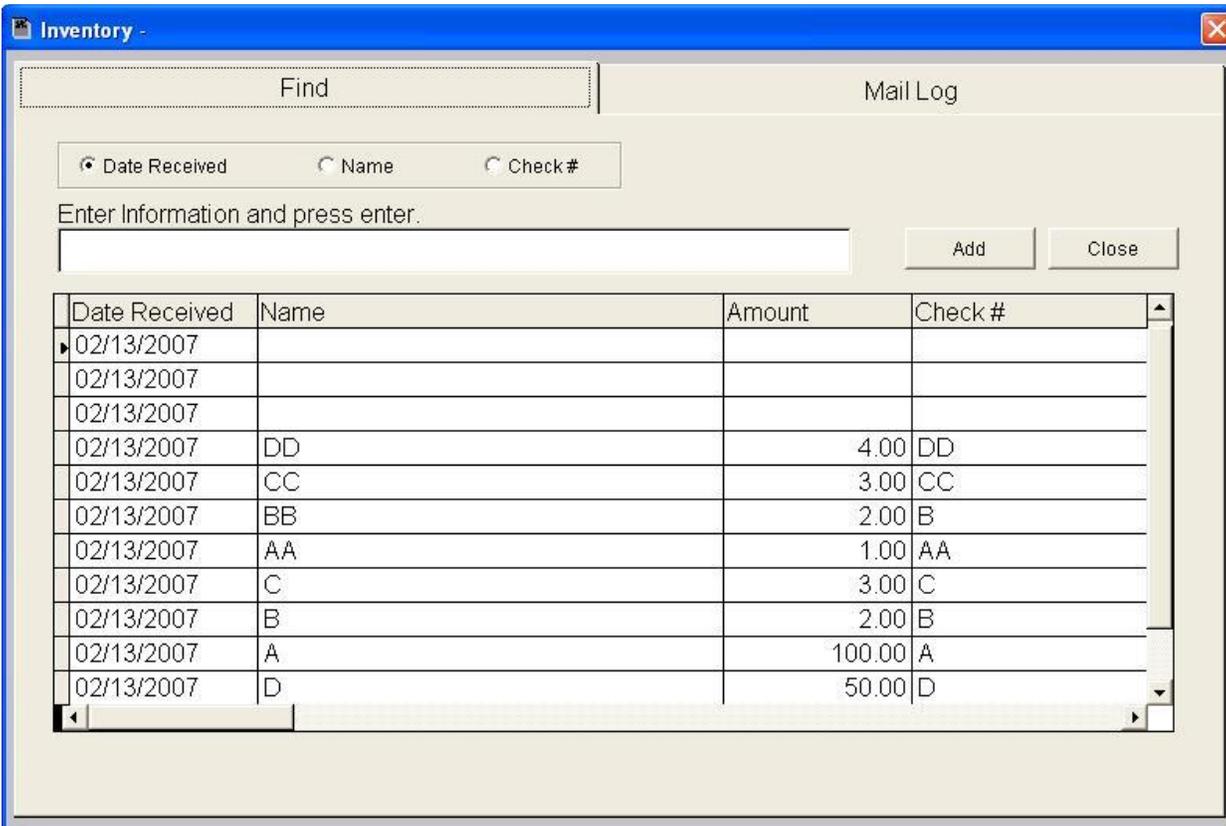
Mail Log

Navigate to **Maintenance -> Mail Log**



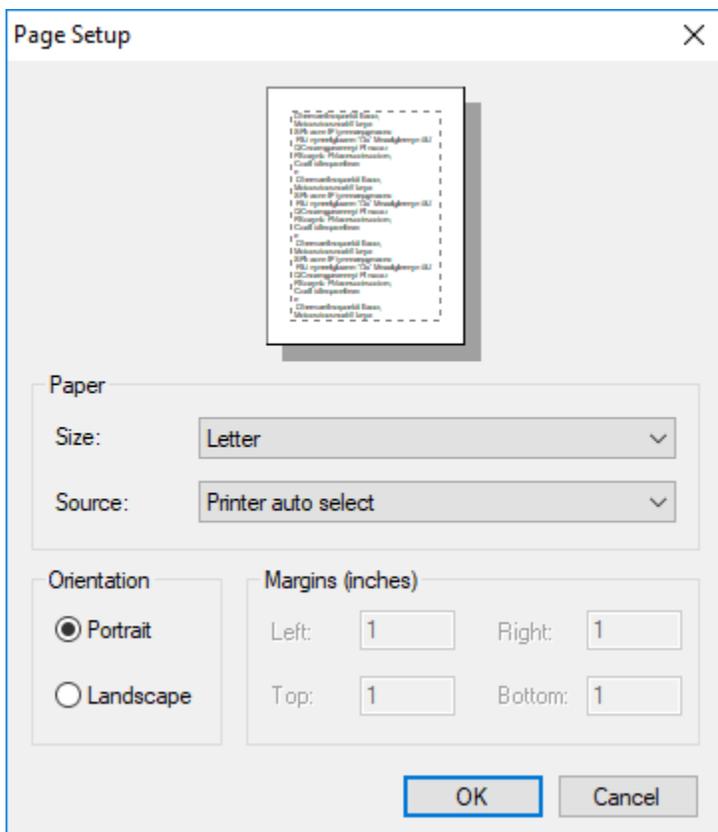
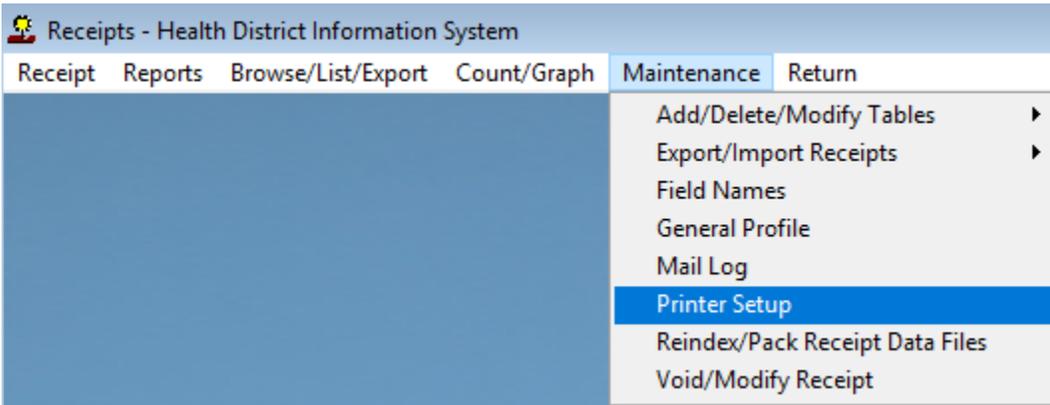
The Mail log is used to register mail that is opened and then distributed to the proper departments.

Can use if you have a desktop email client.



Print Setup

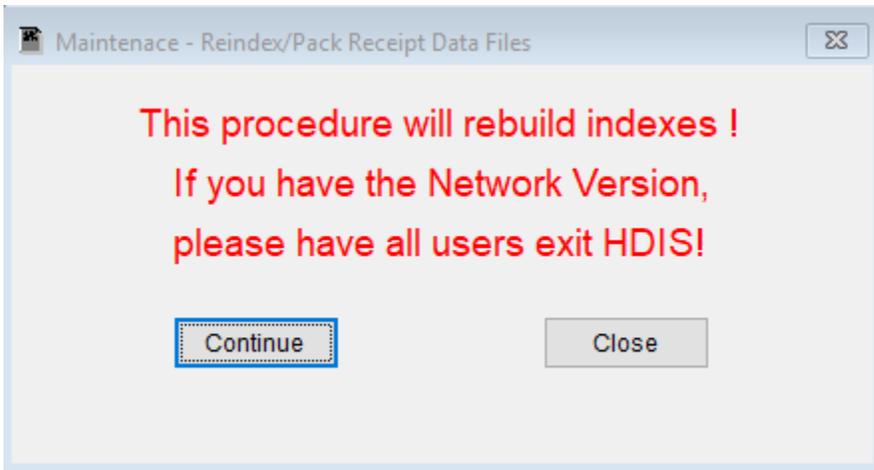
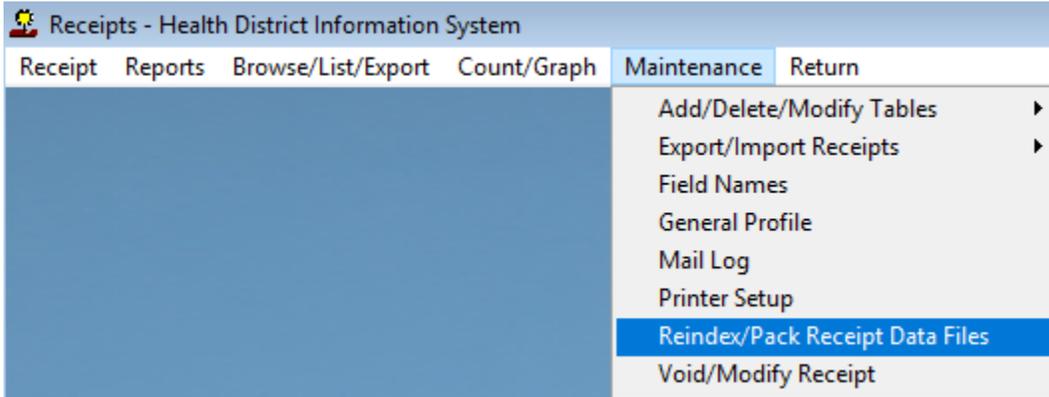
Navigate to **Maintenance -> Printer Setup**



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

Reindex/Pack Receipt Data Files

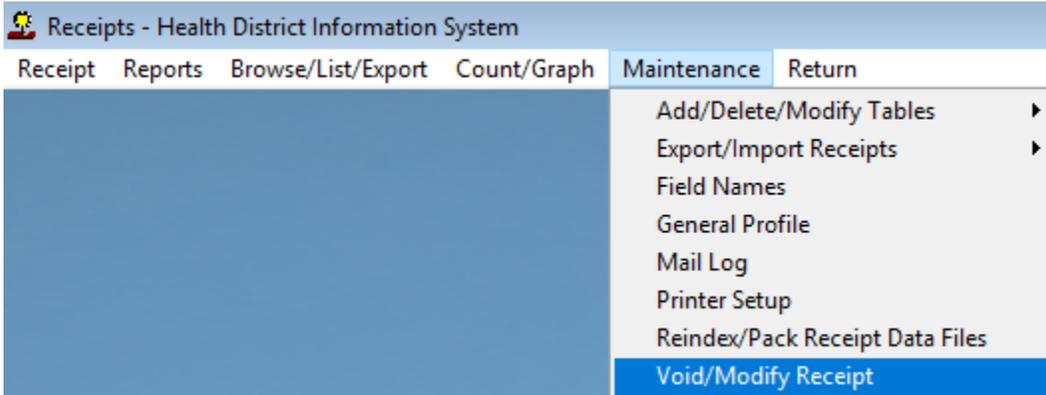
Navigate to **Maintenance -> Reindex/Pack Receipt Data Files**



This function is only needed should your data be corrupted due to a power failure. Please contact BGI if you have any questions or concerns.

Void/Modify Receipt

Navigate to **Maintenance -> Void/Modify Receipt**

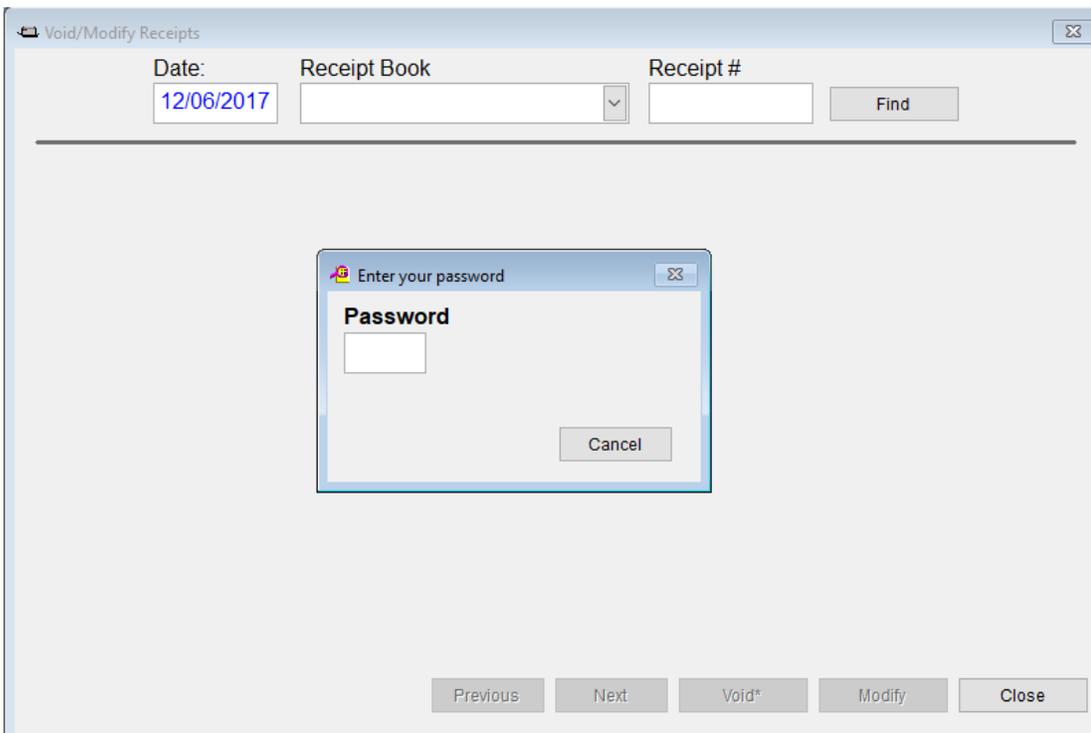


You use this utility to void a receipt or make a minor correction to the information linked to the receipt. Enter your password.

Choose the receipt book.

Enter the receipt number and click the find button.

If there are multiple charges you will need to void each charge independently [Even if there is only 1 receipt].



Void/Modify Receipts

Date: 04/10/2002 Receipt Book: FOOD SERVICE Receipt #: 32866

Fee Code	Fee Description	Quantity	Amount	Check #/Cash
01084	COMM RISK III - SMALL LICENSE	1	239.00	1250

Per. # / Lic.# / ID#: 534 Name: JLC PROPERTIES DBA THE PATIO Address/Comment: 3266 NORTH RIDGE ROAD

Received by: BF Health Department Fund #: 010-73-210 Health Department Fund # Description: LICENSES - FOOD SERVICE/VEND

Account # Code: 0009 Sub Account # Code: 000901 Sub Account # Description: LICENSE FOOD SERVICE/LOCAL

Field/Button	Description
Previous	Show previous record
Next	Show next record
Void*	Right click to void a receipt
Modify	Click to modify a particular field
Close	Close the window
Previous	Show previous record

Chapter 4: Browse/List/Export

Inside the Receipts module navigate to the “Browse/List/Export.”

This section allows the exportation of data, also allowing the user to use **Filters**.

Receipts - Browse/List/Export

Output to:

Screen

Printer

DBF file

SDF file

Delimited file

C:\HDIS\EXPORT\RECEIPTS

Browse

Output data:

All Fields

Selected fields only

Sort by: (3 Max)

< >

ADHOC report 1

ADHOC report 2

ADHOC report 3

Amount

CPT code

Certified

Check #

Comment

Date

Division

Effective date

Fee code

Fee description

Fund code

Fund description

Fund number

Fund number

HD regulation

ICD9 code

OK

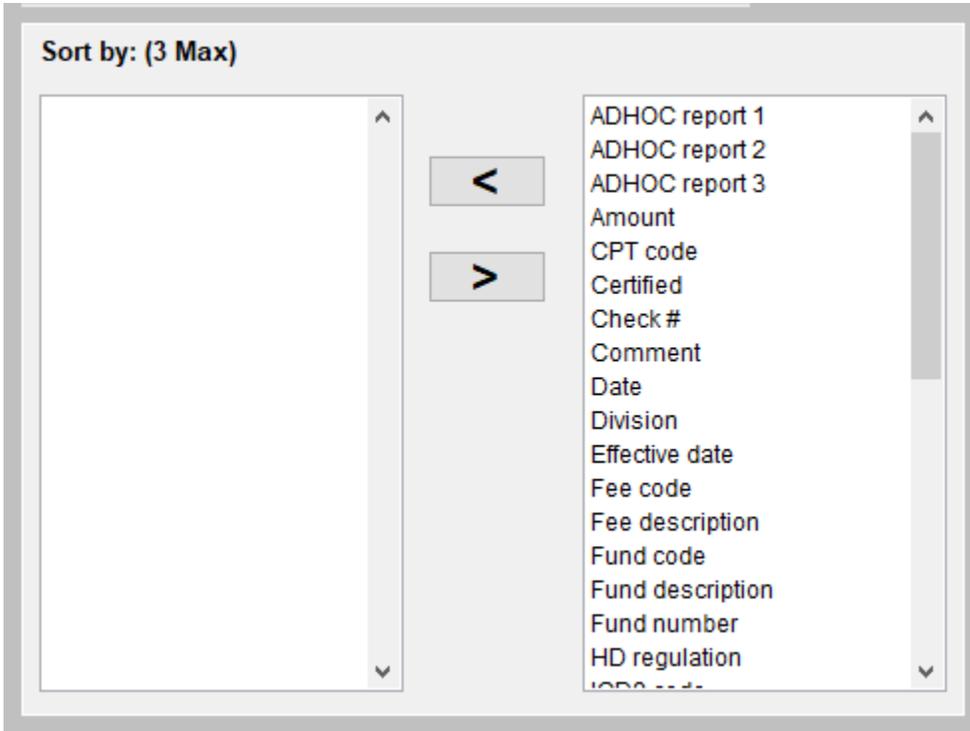
Close

Filters

Font

Sort by

Sorting by Field Names (3 Max) is an option. Click on the Field Name you want to sort by and press the “<” symbol to move the Field Name to the empty box. If you want to remove a Field Name, click the Field Name and press the “>” symbol.



Filters

From the “Browse/List/Export,” click on the “Filters” button. This section allows you to set filters based on the “Output Field.”

Output Field	Data	Data
<input type="checkbox"/> ADHOC REPORT 1	=	=
<input type="checkbox"/> ADHOC REPORT 2	=	=
<input type="checkbox"/> ADHOC REPORT 3	=	=
<input type="checkbox"/> AMOUNT	=	=
<input type="checkbox"/> CPT CODE	=	=
<input type="checkbox"/> CERTIFIED	=	=
<input type="checkbox"/> CHECK #	=	=
<input type="checkbox"/> COMMENT	=	=
<input type="checkbox"/> DATE	=	=
<input type="checkbox"/> DIVISION	=	=
<input type="checkbox"/> EFFECTIVE DATE	=	=
<input type="checkbox"/> FEE CODE	=	=
<input type="checkbox"/> FEE DESCRIPTION	=	=
<input type="checkbox"/> FUND CODE	=	=
<input type="checkbox"/> FUND DESCRIPTION	=	=
<input type="checkbox"/> FUND NUMBER	=	=
<input type="checkbox"/> HD REGULATION	=	=
<input type="checkbox"/> ICD9 CODE	=	=
<input type="checkbox"/> LICENSE#	=	=
<input type="checkbox"/> MAJOR LINE CODE	=	=
<input type="checkbox"/> MAJOR/SUB LINE DESC	=	=
<input type="checkbox"/> MODULE	=	=
<input type="checkbox"/> MODULE FEE CODE	=	=
<input type="checkbox"/> NAME	=	=
<input type="checkbox"/> POLITICAL SUB CODE	=	=

Buttons: Clear Filter, Open Filter, Save Filter, Close

**** Note **** If you are attempting to create a filter to search for **only** blank data use: “(Blank).”

“(Blank)” is appropriate when you are searching for an unspecified name, date, or Boolean (True/False – Yes/No).

**** Note **** If you want to search for a string with some spacing after the characters use: “AB(B)”.

Example for characters with a space:

Desired Search Result: “Monkey Inc.”

Appropriate Search: “Monkey(B)”

Chapter 5: Count/Graph

Inside the Receipts module navigate to the “Count/Graph.”

This section allows you to create a Count, Pie graph, or bar graph of the data. There is a **Report Title**, **Legend Title**, **List of Field Names**, and **Footer**.

Under the “Output:” there is an option to show the *top ten* or *all* results.

There is a “Filters” button which is identical to the “Filters” in the “Browse/List/Export.” section. [See Page 25 for a recap on “Filters”]

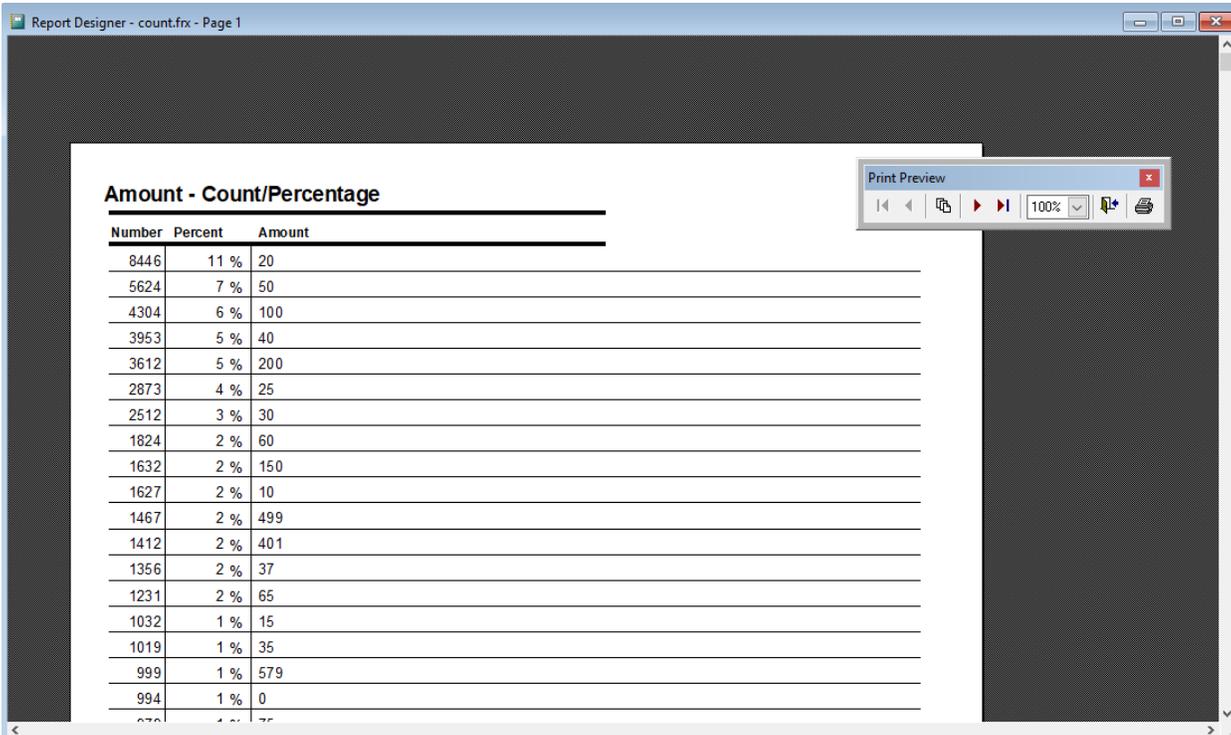
There is a “Sort by” section where you can organize your results from *High to low*, *Low to high*, and by *data*.

Count

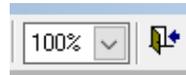
Here is an example of what the “Count” type would look like.

There are percentages and Totals on the side and bottom of the page.

If you choose to add filters, those will also be shown at the bottom of the page.



Click on the door icon next to the percent to return to the menu:

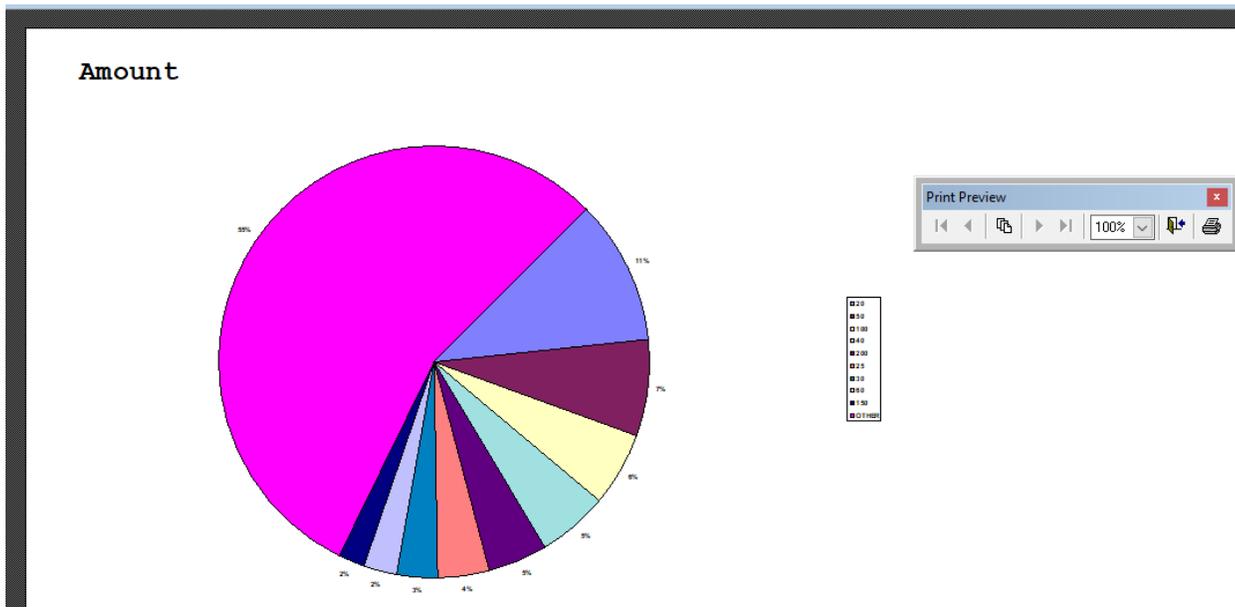


Pie graph

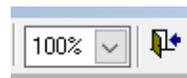
Here is an example of what the “**Pie Graph**” type would look like.

Depending on the data chosen, the percentages are altered to reflect it.

There is a legend displaying the data chosen and the color representation.



Click on the door icon next to the percent to return to the menu:

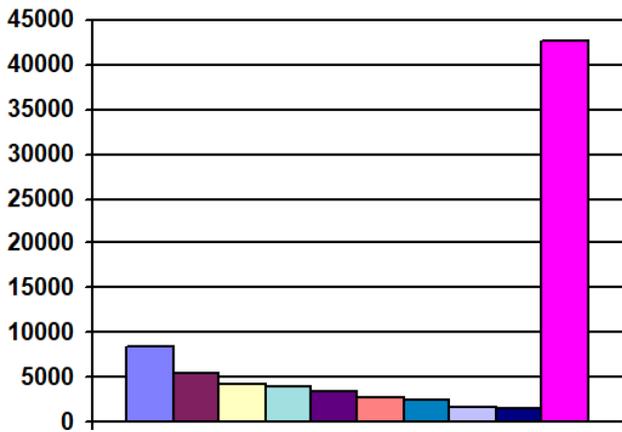


Bar Graph

Here is an example of what the “**Bar Graph**” type would look like.

Depending on the data chosen, there will be a specific color to represent the data’s bar.

Amount



- 20
- 40
- 200
- 25
- 30
- 60
- 150
- OTHER

Print Preview window showing navigation and zoom controls.

Click on the door icon next to the percent to return to the menu:

