



## **Pay In Reports User Manual**



The Baldwin Group, Inc.

7550 Lucerne Drive

Suite 306

Copyright © 1996 - 2018

The Baldwin Group, Inc.

ALL RIGHTS RESERVED

HDIS are trademarks of The Baldwin Group, Inc.

No part of this publication may be stored in a retrieval system, transmitted, or reproduced in any way, including but not limited to photocopy, photograph, magnetic, or other record, without the prior agreement and written permission of The Baldwin Group, Inc.

Windows® and MS-DOS® are registered trademarks of Microsoft Corporation.

Other trademarks are owned by their respective companies.

#### Disclaimer

All data examples containing personal names, company names (or companies), vehicle information, or locations that appear in this guide are fictitious in nature and do not refer to, or portray, in name or substance, any actual names, organizations, entities, or institutions. Any resemblance to any real person (living or dead), organization, entity, or institution is purely coincidental.

## **Table of Contents**

Pay In Reports.....	4
Reports .....	6
Filters .....	8
Browse/List/Export.....	9
Sort by.....	10
Count/Graph.....	11
Count .....	12
Pie Graph .....	14
Bar Graph.....	15
Maintenance.....	16
General Profile .....	16
Printer Setup.....	17

## Pay In Reports

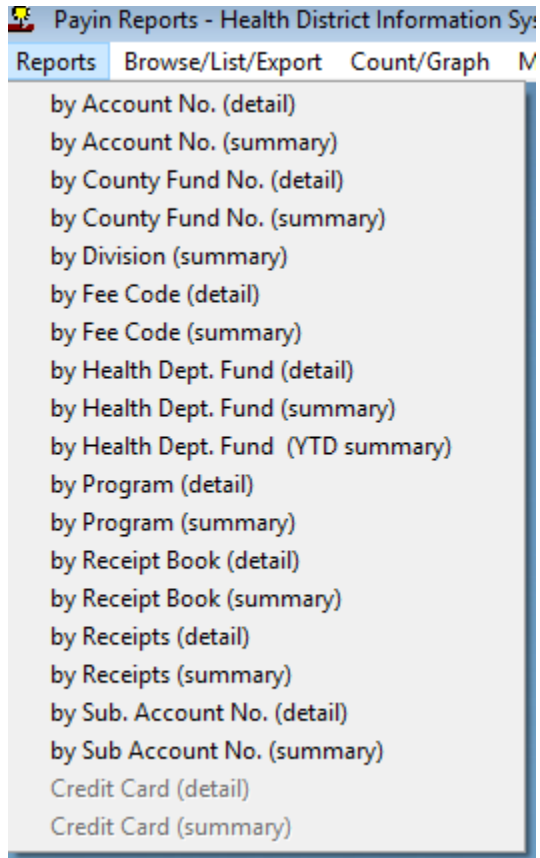
Navigate to **Pay In Reports** through **Environmental Health**:

**Environmental Health > Pay In Reports**



*This module is connected to the Receipt module and allows you to create reports based on Receipts.*

Once inside **Pay in Reports** click the **Reports** button:



You will see a drop-down list filled with various types of reports.

## Reports

Report	Description
<b>Pay In Reports</b>	
By Account No. (detail)	Generates a detailed report with date range given by Account number.
By Account No. (summary)	Generates a summary report with date range given by Account number.
By County Fund No. (detail)	Generates a detailed report with date range given by County Fund No.
By County Fund No. (summary)	Generates a summary report with date range given by County Fund No.
By Division (summary)	Generates a summary report with date range given by Division.
By Fee Code (detail)	Generates a detailed report with date range and Receipt Book given by Fee Code.
By Fee Code (summary)	Generates a summary report with date range and Receipt Book given by Fee Code.
By Health Dept. Fund (detail)	Generates a detailed report with date range given by Health Dept. Fund
By Health Dept. Fund (summary)	Generates a summary report with date range given by Health Dept. Fund
By Health Dept. Fund (YTD summary)	Generates a YTD summary report with date range given by Health Dept. Fund
By Program (detail)	Generates a detailed report with date range given by Program.
By Program (summary)	Generates a summary report with date range given by Program

By Receipt Book (detail)	Generates a detailed report with date range and Receipt Book given by Receipt Book.
By Receipt Book (summary)	Generates a summary report with date range and Receipt Book given by Receipt Book.
By Receipts (detail)	Generates a detailed report with date range and Receipt Book given by Receipts.
By Receipts (summary)	Generates a summary report with date range and Receipt book given by Receipts.
By Sub. Account No. (detail)	Generates a detailed report with date range given by Sub. Account No.
By Sub Account No.(summary)	Generates a summary report with date range given by Sub Account No.

Example of entering a date range to generate a report:

Receipts Report Options - by Account No. (detail)

**Output to:**

☒ Preview

☐ Printer

**From date**  
 / /

**To date**  
 / /

OK

Close

Filters

## Filters

Filters allow you to generate the output you want in a report or Browse/List/Export with specifically defined variations.

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

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)"*



## Browse/List/Export

This section allows the exportation of data, also allowing the user to use [Filters](#).

There are also multiple ways for you to output the data: Screen, Printer, DBF file, SDF file, and Delimited file. If you pick DBF file, SDF file, or Delimited file make sure you select the appropriate path. Select "Browse" to find the needed path.

**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

HD regulation

HD report

< >

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.

The screenshot shows a window titled "Sort by: (3 Max)". It contains two list boxes and two buttons. The left list box is empty. The right list box contains the following field names: 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, HD regulation, and ICD9 code. Between the two list boxes are two buttons: a left-pointing arrow (<) and a right-pointing arrow (>).

## Count/Graph

Inside the **Pay In Reports** module navigate to the **Count/Graph**.

Create the title you would like as the **Report Title**.

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**, **Footer**, and **Output to** section. The **Output to** gives you options on how you want to display or store your results.

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. The purpose of the filters section is so you can manipulate the type of results. For example: Let's say you wanted to see results from a certain date range. If you go into filters you can create a date range and the results will only display those records.

There is a **Sort by** section where you can organize your results from *High to low (Greatest value to lowest value)*, *Low to high (Lowest value to greatest value)*, and by *data* (results will be displayed organized based on the data. Example: If it is based on ID numbers, the numbers will be organized in order).

In the **Type** area, if you select Totals: **Level 1 Group** and **Level 2 Group** options will display. Select the best options dependent on your search type.

The screenshot shows the 'Receipts - Count/Graph' window with the following sections:

- Report Title:** A text box containing 'ADHOC report 1'.
- Legend Title:** An empty text box.
- Field List:** A scrollable list of fields including 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, HD regulation, ICD9 code, License#, Major line code, Major/Sub line desc, Module, Module fee code, Name, and Political sub code.
- Footer:** An empty text box.
- Buttons:** 'Filters', 'Close', and 'OK' buttons are located at the top right.
- Output to:** A section with radio buttons for 'Screen' (selected), 'Print', 'DBF file', 'SDF file', and 'Delimited file'. Below is a text box with 'C:\HDIS\EXPORT' and a 'Browse' button.
- Output:** A section with radio buttons for 'top ten' and 'all' (selected).
- Type:** A section with radio buttons for 'count' (selected), 'pie graph', 'bar graph', 'Totals', 'pie graph (full page)', and 'bar graph (full page)'.
- Sort by:** A section with radio buttons for 'High to low' (selected), 'Low to high', and 'by data'.
- Level 1 Group:** A list box containing 'ADHOC report 1', 'ADHOC report 2', 'ADHOC report 3', and 'Amount'. A 'Clear' button is next to it.
- Level 2 Group:** A list box containing 'ADHOC report 1', 'ADHOC report 2', 'ADHOC report 3', and 'Amount'. A 'Clear' button is next to it.

## 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.

Report Designer - count.fx - Page 1

1st contact date - Count/Percentage		
Number	Percent	Location city
2419	89 %	/ /
6	0 %	02/23/2016
5	0 %	03/17/2016
5	0 %	04/26/2016
5	0 %	06/03/2016
5	0 %	09/01/2016
4	0 %	04/25/2016
4	0 %	09/09/2016
4	0 %	12/28/2015
266	10 %	OTHER
2723	100 %	Totals

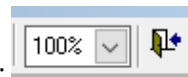
If you choose to add filters, those will also be shown at the bottom of the page.

Report Designer - count.frx - Page 1

Political Sub. Name - Count/Percentage		
Number	Percent	Name
17	40 %	ATLANTIS TWP
7	17 %	HOBBIT ON TWP
5	12 %	
3	7 %	GOTHAM CITY
2	5 %	BUBONICA TWP
2	5 %	METROPOLIS CITY
2	5 %	SHIRE VILLAGE
1	2 %	MORDOR VILLAGE
1	2 %	NEVERLAND CITY
2	5 %	OTHER
42	100 %	<b>Totals</b>

Filters
OOB=N

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

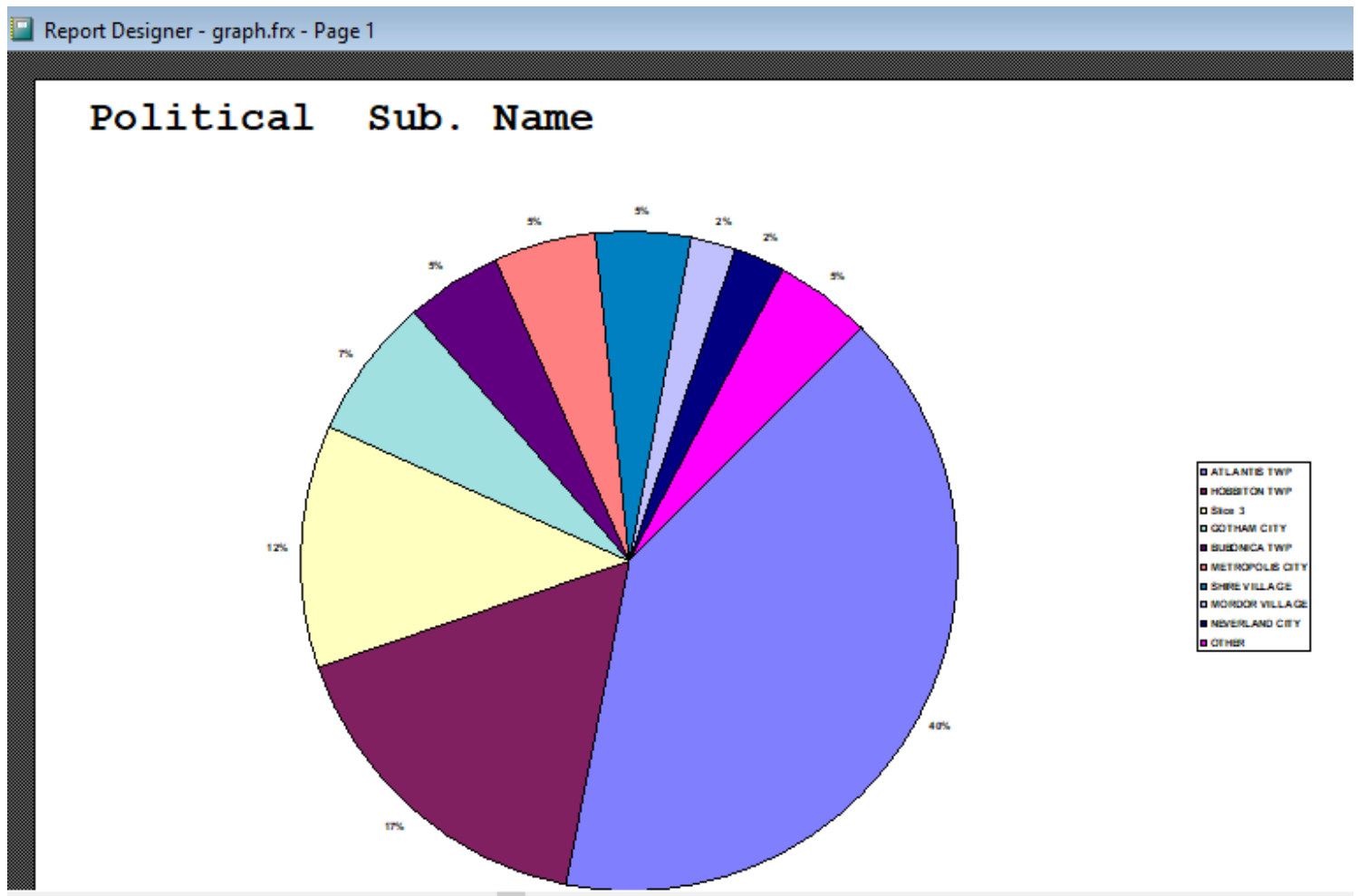


## Pie Graph

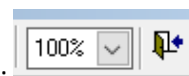
Here is an example of what the **Pie Graph** type would look like.

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

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



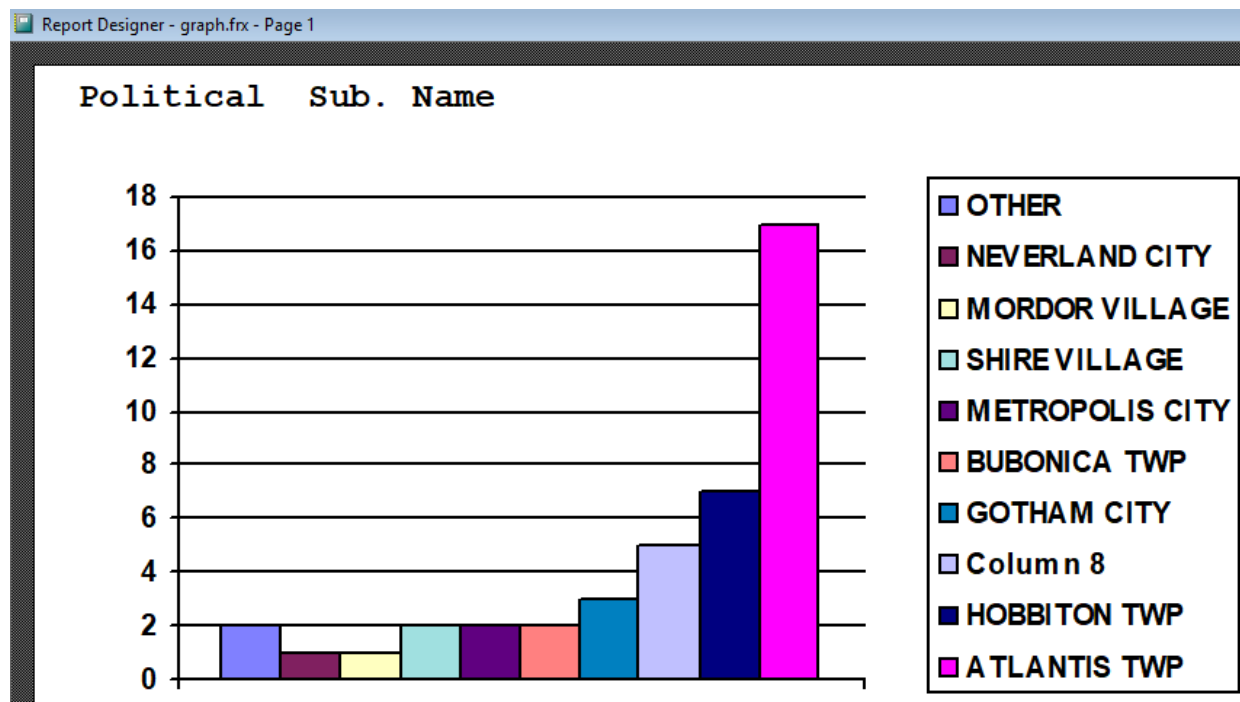
Click on the door icon next to the percent to return to the menu:



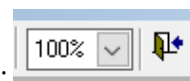
## Bar Graph

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.



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



## Maintenance

Navigate to **Maintenance**

Payin Reports - Health District Information System

Reports Browse/List/Export Count/Graph **Maintenance** Return

General Profile  
Mail Log  
Printer Setup

## General Profile

Navigate to: **Maintenance > General Profile**

The General Profile is where you can create program wide settings that affect all modules.

There are also specific module settings you can fine-tune.

General Profile

Demographics General Management Environmental Community & Public Health Services Vital

\* Health Department BGI HD \* City Middleburg Heights

Division \* State OH

\* Address1 7550 Lucerne Drive \* Zip 44130

Address2 \* 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 ☐ 2017 ☐ 2016 ☐ 2015 ☐ 2014 ☐ 2013 ☐ 2012 ☐ 2011 ☐ 2010 ☐ 2009 ☐ 2008  
☐ 2007 ☐ 2006 ☐ 2005 ☐ 2004 ☐ 2003 ☐ 2002 ☐ 2001 ☐ 2000 ☐ 1999 ☐ 1998

System Settings Heartbeat Active ☐ Frequency 60 seconds

Workstation Settings Station ID 51CAAE9B-CA36-49CF-8092-FADC821D4648  
Station Description Workstation Description  
Heartbeat Activated ☐ Frequency 60 seconds

\* - Required Fields Cancel Close



## Printer Setup

Navigate to: **Maintenance > Printer Setup**

The print setup allows you to choose from what printer you would like to print.

Select the printer in the name dropdown and click **OK**.

**Page Setup** [X]

**Paper**

Size: Letter

Source: Printer auto select

**Orientation**

☒ Portrait

☐ Landscape

**Margins (inches)**

Left: 1 Right: 1

Top: 1 Bottom: 1

OK Cancel