



Payin Reports User Manual



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Payin Reports

Navigate to Payin Reports through Vital Statistics:

Vital Statistics > Payin Reports

Lealth District Information System







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

Once inside Payin Reports click the Reports button:

Payin Reports - Health District Information Sy: Reports Browse/List/Export Count/Graph Μ by Account No. (detail) by Account No. (summary) by County Fund No. (detail) by County Fund No. (summary) by Division (summary) by Fee Code (detail) by Fee Code (summary) by Health Dept. Fund (detail) by Health Dept. Fund (summary) by Health Dept. Fund (YTD summary) by Program (detail) by Program (summary) by Receipt Book (detail) by Receipt Book (summary) by Receipts (detail) by Receipts (summary) by Sub. Account No. (detail) by Sub Account No. (summary) Credit Card (detail) Credit Card (summary)

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





Reports

Report	Description
Pay In Reports	
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 Ac	count No. (detail)	
Output to: From date OK Image: Preview Image:	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.

ield Name	Data	Data	1st sort 2nd sort 3rd sort
ADHOC REPORT 1	= ~	= 🗸	
ADHOC REPORT 2	= 🗸	= 🗸	
ADHOC REPORT 3	= ~	= 🗸	
AMOUNT	= ~	= 🗸	
OPT CODE	= ~	= 🗸	
CERTIFIED	= ~	= 🗸	
CHECK #	= ~	= 🗸	
COMMENT	= ~	= ~	
DATE	= ~	= ~	
DIVISION	= ~	= ~	
FFECTIVE DATE	= ~	= ~	
EE CODE	= ~	= 🗸	
EE DESCRIPTION	= ~	= ~	
UND CODE	= ~	= ~	
UND DESCRIPTION	= ~	= 🗸	
UND NUMBER	= ~	= 🗸	
ID REGULATION	= ~	= 🗸	
CD9 CODE	= ~	= 🗸	
ICENSE#	= 🗸	= 🗸	
AJOR LINE CODE	= ~	= 🗸	
AJOR/SUB LINE DESC	= ~	= 🗸	
IODULE	= 🗸	= ~	
IODULE FEE CODE	= 🗸	= ~	
AME	= 🗸	= ~	
POLITICAL SUB CODE	= 🗸	= ~	
			· · · · ·

** 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.







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.







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 <u>Filters</u> in the <u>Browse/List/Export</u> 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 I Group** and **Level 2 Group** options will display. Select the best options dependent on your search type.

Report Title					
ADHOC report 1			Filters Clos	e OK	
.egend Title					
		Output to:			
		Screen	○ Print		
ADHOC report 1	^		O SDE file O Delimite	d file	
ADHOC report 2		O DDI Ille		iu liie	
ADHOC report 3		C:\HDIS\EXE	PORT	Browse	
Amount		0.1101012.1		5.5.055	
CPT code					
Certified		Output			
Check#		Output:	_		
Comment		O top ten	() all		
Date					
Division		Tune		Carthu	
Effective date		Type		SOLUY	
Fee code		count	○ Totals	High to low	
Fee description		O pie graph	O pie graph (full page)	O Low to high	
Fund code		O har graph	h O har granh (full nage)	O hu data	
Fund description		U bai graph	(un page)	O by data	
Fund number					
HD regulation		Level 1 Group	ADHOC report 1	^	
ICD9 code			ADHOC report 2	Clos	
License#			ADHOC report 3	Clea	
Major line code			Amount	¥	
Major/Sub line desc		Lovel 2 Croup	ADHOC report 1		
Module		Level 2 Group	ADHOC report 2		
Module fee code			ADHOC report 3	Clea	
Name	~		Amount		
Delitical aub code	•		Amount	Ŧ	
Footer					





<u>Count</u>

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 - co	ount.frx -	Page 1		
				^
19	st con	ntact da	e - Count/Percentage	
N	umber	Percent		
-	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	
-				
4				~





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 %	ATLANTISTWP
7	17 %	HOBBITON TWP
5	12 %	
3	7%	GOTHAMCITY
2	5%	BUBONICATWP
2	5%	METROPOLIS CITY
2	5%	SHIRE VILLAGE
1	2 %	MORDOR VILLAGE
1	2 %	NEVERLAND CITY
2	5%	OTHER
42	100 %	Totals
		-
Filters		
OOB=N		

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





₽•

100% 🗸



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.

📓 Report Designer - graph.frx - Page 1



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:

Print	Prev	view				x
- I-I		6	▶	ÞI	100% 🗸 🏴	8





Maintenance

Navigate to Maintenance

🚊 Payin	Reports - Health Dist	rict Information	System	
Reports	Browse/List/Export	Count/Graph	Maintenance	Return
			General Pro	ofile
Mail Log				
			Printer Setu	р

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	М	anagement		Environm	ental	Co	mmunity & Pu	ublic Health	Services		Vital
★ Health Depa	tment BGI HD					★ City	Middleburg H	leights			
٦	vision					* State	OH				
★ Adı	ress1 7550 L	ucerne Drive				\star Zip	44130				
Ad	ress2					\star County	Kayle				
* Pho	ne#s 1-440-8	91-9100				* FAX #	1-440-891-9	458			
Federal	Tax ID ADFA										
Commis	sioner Doc Da	rrell									
Client/Server Lo	cation M:\HDIS	S\DATA									
	Email ADFAS	D									
Make Checks Paya	ble to: ADSF										
View Ar	hives 2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	
	2007	2006	2005	2004	2003	2002	2001	2000	1999	1998	
System Settings Heartbeat /	ctive	Frequency	60 se	conds							
Workstation Settings Stati	on ID 51CAAE	9B-CA36-49	CF-8092-FA	DC821D464	48						
Station Descr	ption Workst	ation Descrij	otion								
Heartbeat Acti	ated 🗌	Frequency	60 se	conds							
							🗙 - Requ	ired Fields	Canc	el	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	×
Paper	Non-start with Plance Non-start with Plance 1
Size	Letter V
5120.	Letter
Source:	Printer auto select \sim
Orientation	Margins (inches)
Portrait	Left: 1 Right: 1
◯ Landscape	Top: 1 Bottom: 1
	OK Cancel

