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

Food Protection (FSO-RFE)
User Manual

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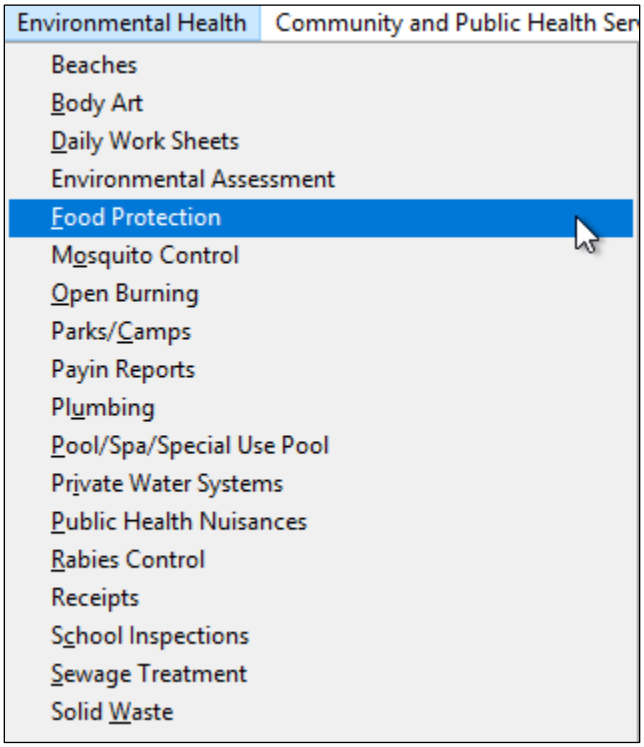
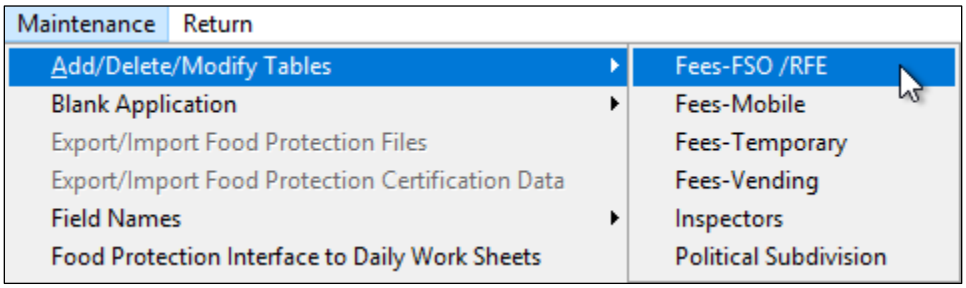
Chapter 1: Getting Started

Once the Food Protection Module has been installed, it can be accessed by going to:
Environmental Health > Food Protection

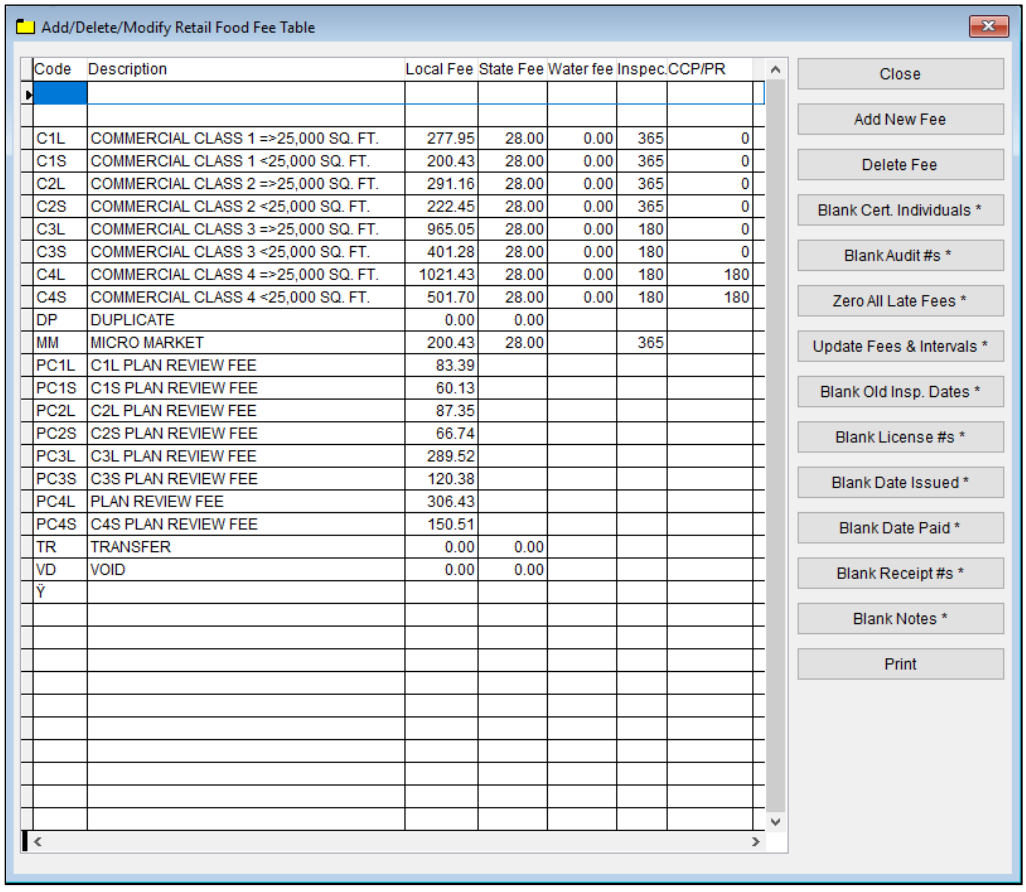


The first order of business is to complete the control files that will drive the module. After going into the Food Protection Module, these files can be found by going to: Maintenance > Add/Delete/Modify Tables.



Fees – FSO/RFE

From the Food Protection Module, navigate to: Maintenance > Add/Delete/Modify Tables > Fees-FSO/RFE.



Code	Description	Local Fee	State Fee	Water fee	Inspec	CCP/PR
C1L	COMMERCIAL CLASS 1 =>25,000 SQ. FT.	277.95	28.00	0.00	365	0
C1S	COMMERCIAL CLASS 1 <25,000 SQ. FT.	200.43	28.00	0.00	365	0
C2L	COMMERCIAL CLASS 2 =>25,000 SQ. FT.	291.16	28.00	0.00	365	0
C2S	COMMERCIAL CLASS 2 <25,000 SQ. FT.	222.45	28.00	0.00	365	0
C3L	COMMERCIAL CLASS 3 =>25,000 SQ. FT.	965.05	28.00	0.00	180	0
C3S	COMMERCIAL CLASS 3 <25,000 SQ. FT.	401.28	28.00	0.00	180	0
C4L	COMMERCIAL CLASS 4 =>25,000 SQ. FT.	1021.43	28.00	0.00	180	180
C4S	COMMERCIAL CLASS 4 <25,000 SQ. FT.	501.70	28.00	0.00	180	180
DP	DUPLICATE	0.00	0.00			
MM	MICRO MARKET	200.43	28.00		365	
PC1L	C1L PLAN REVIEW FEE	83.39				
PC1S	C1S PLAN REVIEW FEE	60.13				
PC2L	C2L PLAN REVIEW FEE	87.35				
PC2S	C2S PLAN REVIEW FEE	66.74				
PC3L	C3L PLAN REVIEW FEE	289.52				
PC3S	C3S PLAN REVIEW FEE	120.38				
PC4L	PLAN REVIEW FEE	306.43				
PC4S	C4S PLAN REVIEW FEE	150.51				
TR	TRANSFER	0.00	0.00			
VD	VOID	0.00	0.00			
Y						

The information entered in this table populates the fee code dropdown box in the module.
To enter FRS/RFE fees, follow these steps (use the tab key to advance to each field):

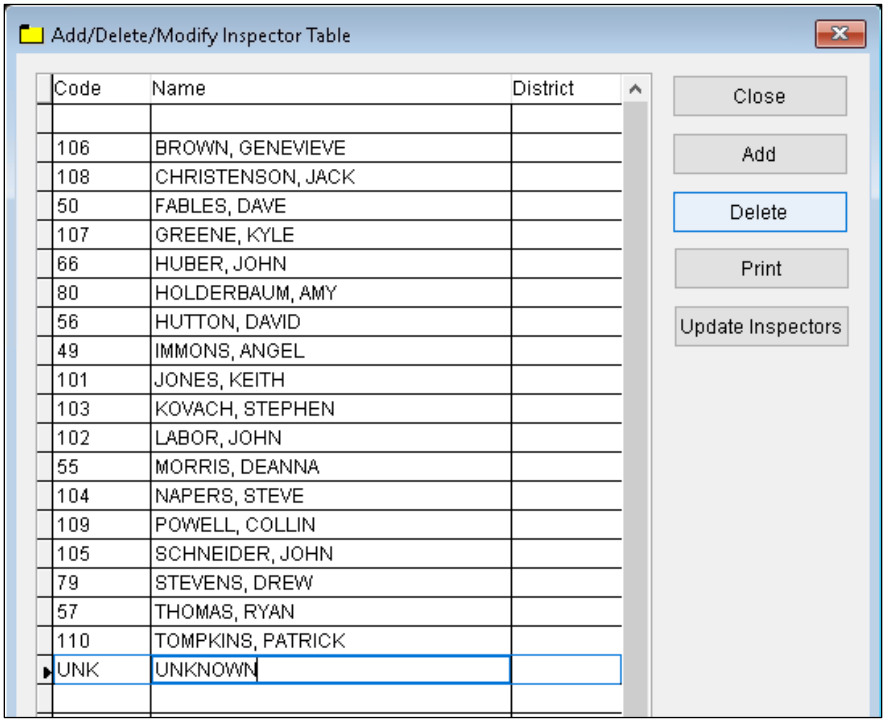
1. Click **Add New Fee** and enter a **Code** to identify this fee. It can be up to four characters long.
2. Enter a **Description** for this fee code.
3. Enter the amount of the **Local Fee** for this fee code.
4. Enter the amount of the **State Fee** for this fee code.
5. Enter the amount of the **Water Fee** for this fee code. (This deals with a bacterial water sample.)
6. Enter the **Inspection** Interval in days.
7. Enter the **CCP/PR** (Critical Control Point/Process Review) Interval in days.
8. Repeat steps 1-7 as many times as necessary.
9. Click **Close** to exit the table.

Additional information:

1. Other buttons will be outlined later, as needed.
2. **Delete Fee**: Use to delete the record where your cursor is positioned.
3. **Print:** Use to print the list.

Inspectors

From the Food Protection Module, navigate to: Maintenance > Add/Delete/Modify Tables > Inspectors.



If you have other HDIS Modules, this file may already be completed. The information entered in this table populates the inspector dropdown box in the module. This table cannot be populated "on the fly", so information must be entered here if you want it available in dropdown boxes throughout the module.

To enter Inspectors, follow these steps (use the tab key to advance to each field):

1. Click **Add** and enter a **Code** to identify this inspector. It can be up to four characters long.
2. Enter the **Name** of this inspector (Last Name, First Name).
3. Enter the **District** this inspector is assigned to, if applicable.
4. Repeat steps 1-3 as many times as necessary.
5. Click **Close** to exit the table.

Additional information:

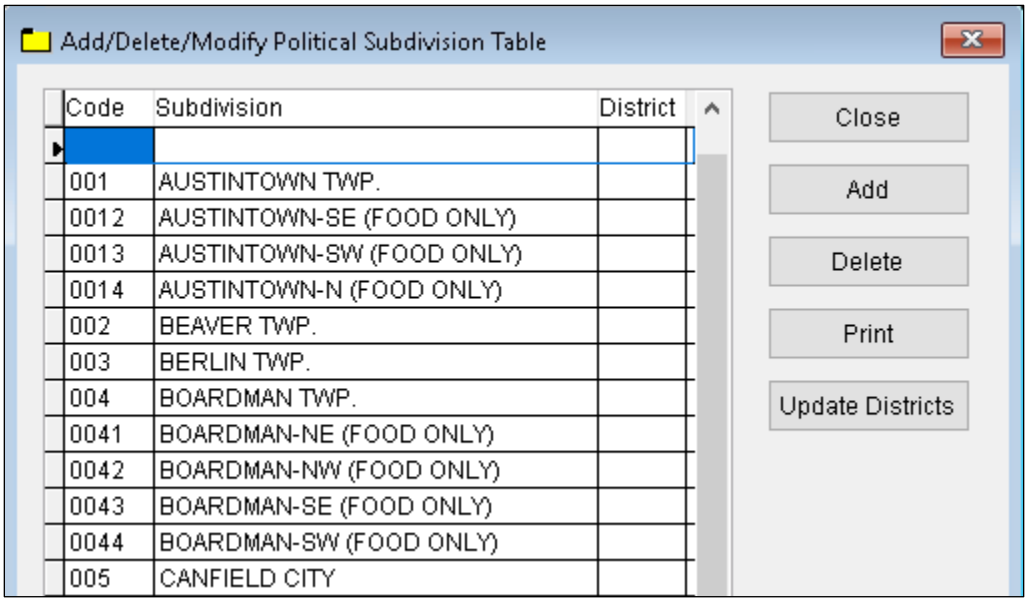
1. **Delete**: Use to delete the record where your cursor is positioned.
2. **Print:** Use to print the list.
3. **Update Inspectors:** Discussed later.

Political Subdivision

If you have other **HDIS** Modules, this file may already be completed.

The information entered in this table populates political subdivision dropdown boxes in the module.

From the Food Protection Module, navigate to**: Maintenance > Add/Delete/Modify Tables >Political Subdivisions**



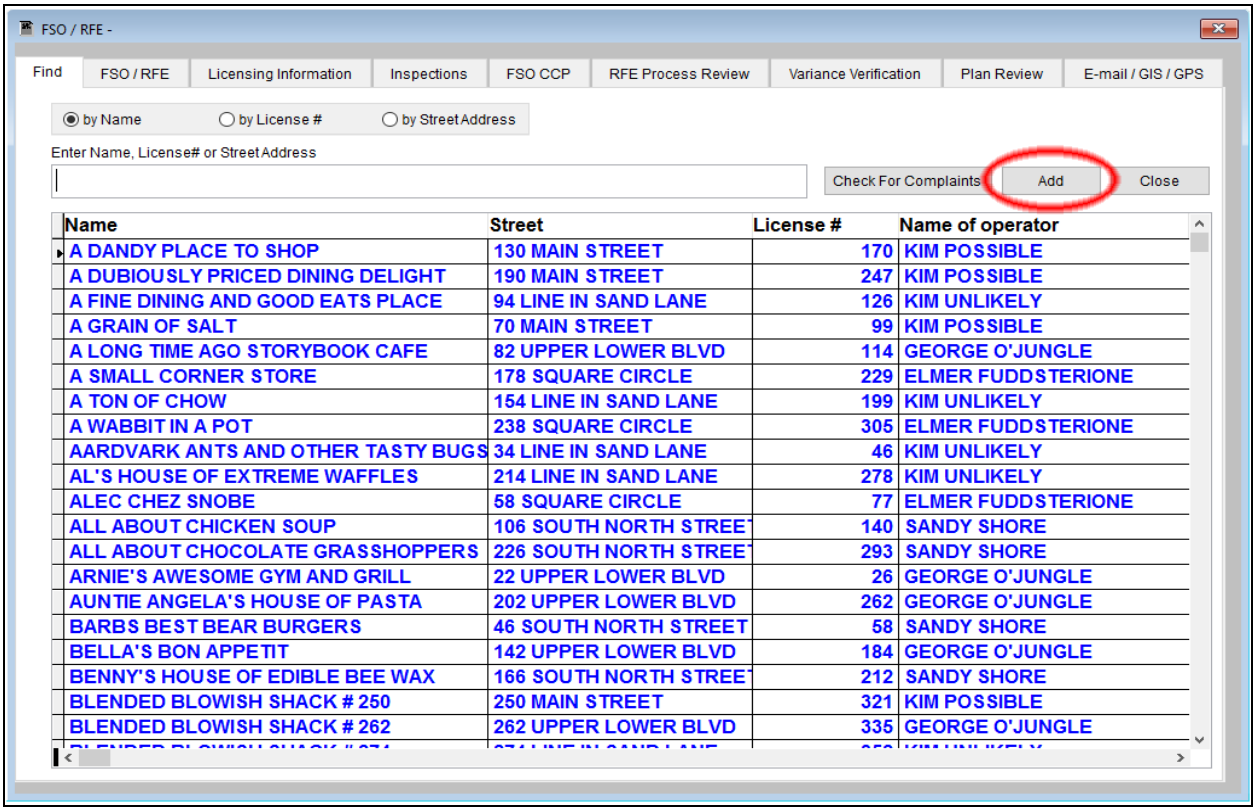
1. Click **Add** and enter a **Code** to identify this political subdivision. It can be up to four characters long
2. Enter the name of this political **Subdivision**.
3. Enter the **District** this subdivision is assigned to, if applicable.
4. Repeat steps 1-3 as many times as necessary.
5. Click **Close** to exit the table.

Additional information:

1. **Delete**: Use to delete the record where your cursor is positioned.
2. **Print:** Use to print the list.
3. **Update Districts:** Discussed later.

Chapter 2: Entering FSO/RFE Information

From the Food Protection Module, navigate to: **Food Protection > FSO/RFE**



The **FIND** tab on the FSO/RFE window is for finding a previously entered FSO/RFE.

You can browse through the grid to find a name or type the name in the **Enter Name, License# or Street Address** field and then press the enter key on your keyboard.

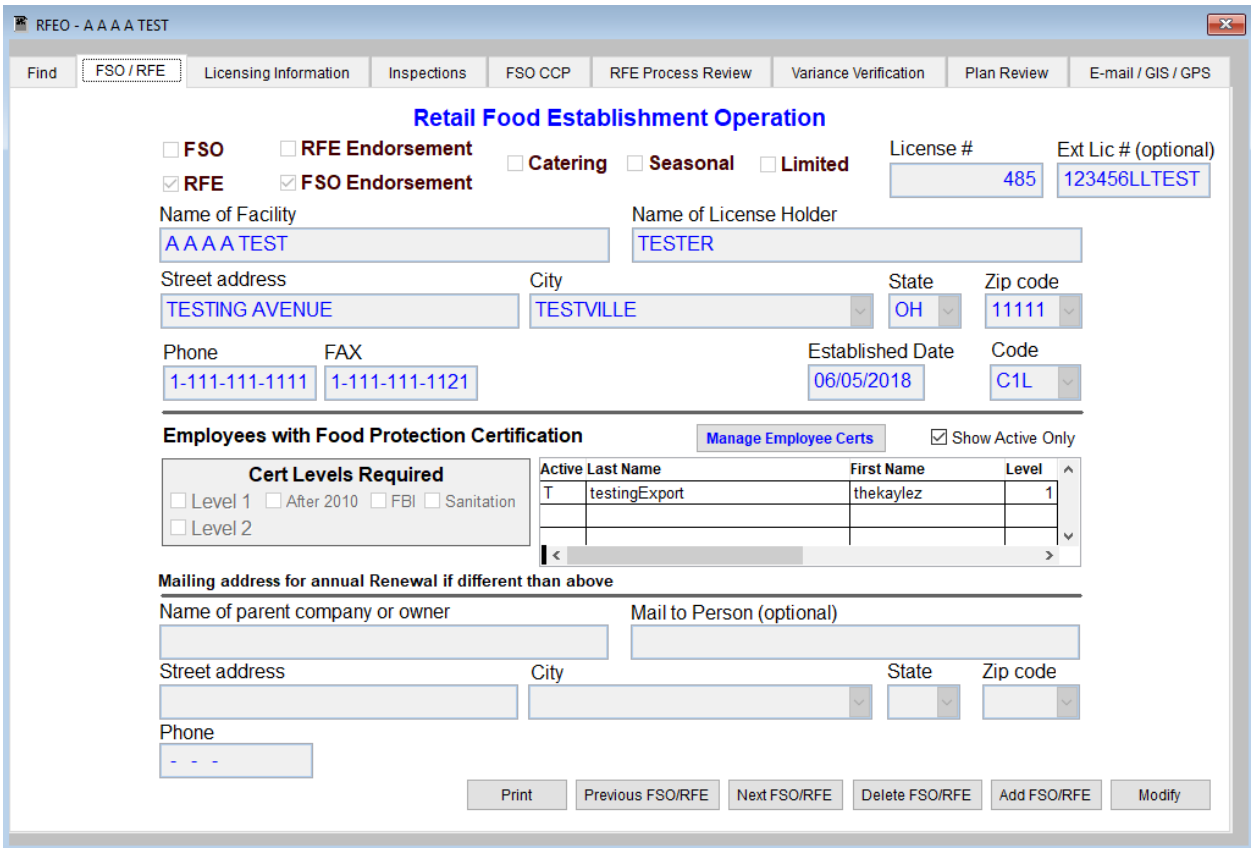
To find a FSO/RFE by **License #,** click the radio button labeled **by License #** and then enter the license number.

To find a FSO/RFE by **Street Address**, click the radio button labeled **by Street Address** and enter the street address.

Click the **Add** button to enter a FSO/RFE. Once you click the **Add** button, you have entered a FSO/RFE record.

You **do not** have to click the **Add** button again after you have entered the information.

FSO/RFE Tab:



You may now begin to enter information into the fields.

Remember, you can use the **Tab** key to advance from field to field.

On this page, you will fill out the information for the FSO/RFE and the licensee that you received from the application.

Field/Button	Description
FSO	Mark this checkbox if this is a Food Service Operation
RFE Endorsement	Mark this checkbox if the FSO also has an endorsement for a Retail Food Establishment
RFE	Mark this checkbox if this is a Retail Food Establishment
FSO Endorsement	Mark this checkbox if the RFE also has an endorsement for a Food Service Operation
Catering	Mark this checkbox if this establishment provides catering services
Seasonal	Mark this checkbox if this establishment is seasonal
Limited	Mark this checkbox if this establishment has any type of limitation on their license. EXAMPLES: Only pre-washed foods that are pack aged as ready to eat may be used. Only disposable ware and utensils may be used in the preparation and serving of food.

License #	Will automatically be completed with the next license #.
Name of Facility	Enter the name of the facility
Name of License Holder	Enter the name of the license holder
Street Address	Enter the street address of the facility
City	Enter the city of the facility
State	Enter the state of the facility
Zip Code	Enter the zip code of the facility
Phone	Enter the phone # for the facility. ** Note: Must start with a "1"
Fax	Enter the fax # for the facility. ** Note: Must start with a "1"
Established Date	Enter the date the facility was established
Code	Choose the appropriate code for this facility
Mailing address for annual Renewal if different than above	
Name of parent company or owner	Enter the name of parent company or owner if different than above
Mail to person (optional)	Enter the name of the "mail to" person if different than above
Street address	Enter the mailing street address if different than above
City	Enter the mailing city if different than above
State	Enter the mailing state if different than above
Zip Code	Enter the mailing zip code if different than above
Phone	Enter the phone if different than above. **Note: Must start with a "1".

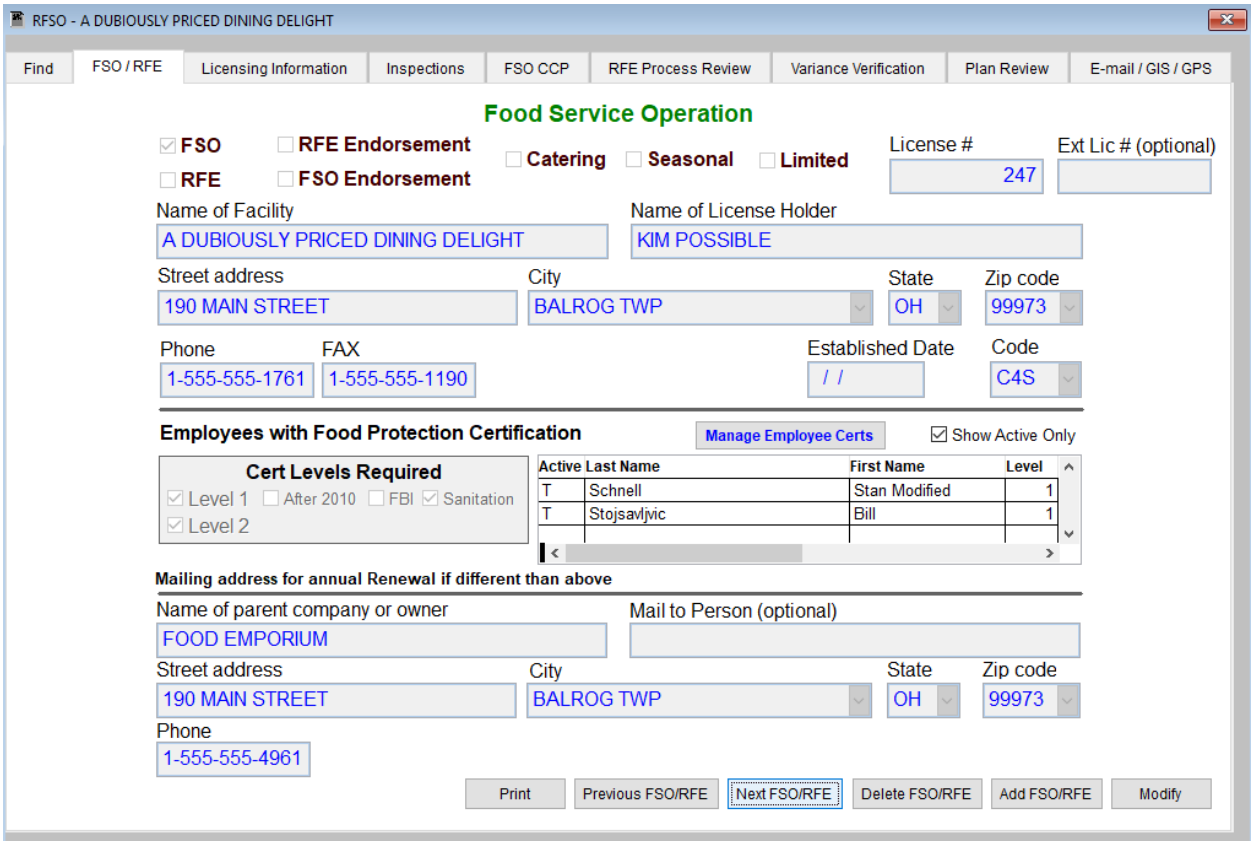
Food Protection Certification

When entering new establishments or modifying existing establishments, you need to make sure that the correct Certification Levels are specified within the **Cert Levels Required** section of the **FSO/RFE tab** on the **FSO/RFE** screen.

On this screen you may directly check or uncheck the **Level 2** box, but may only indirectly change the status of the **Level 1 box**.

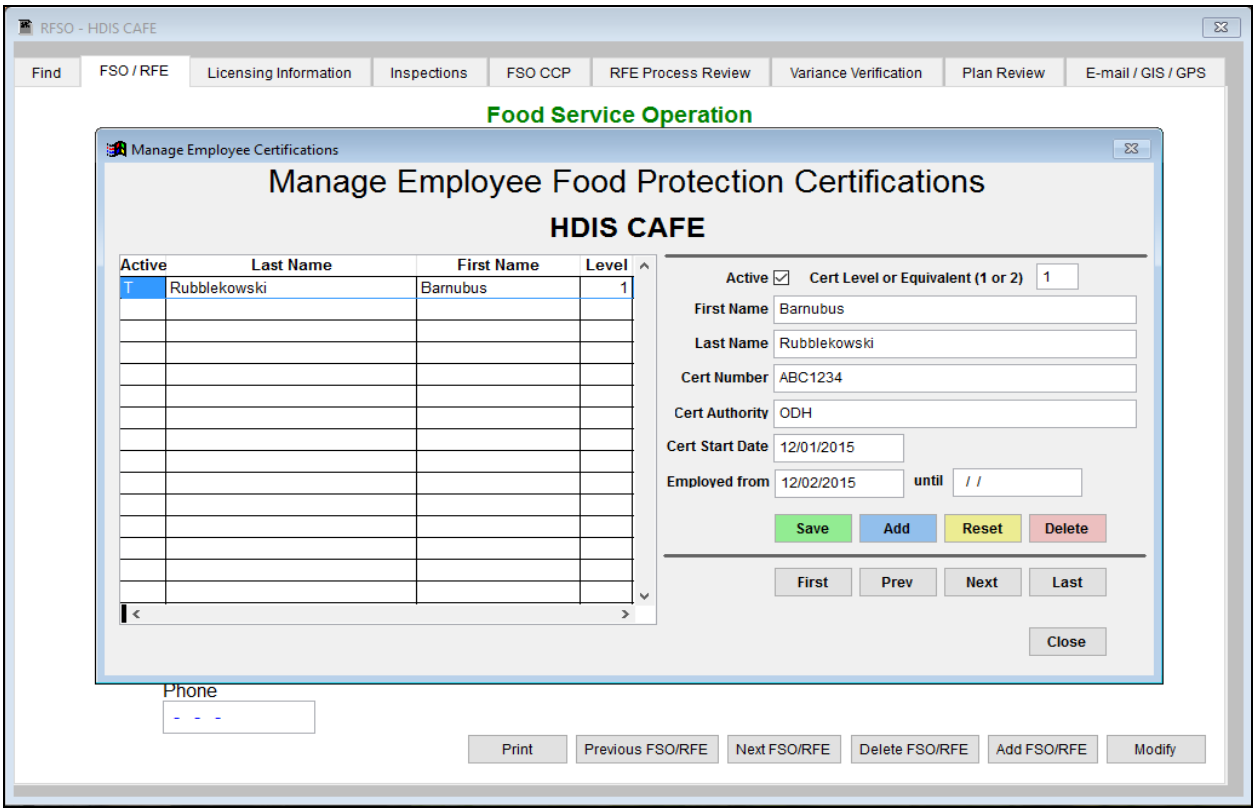
If none of the sub-requirements are selected for Level 1, then **Level 1** is not required.

If one or more of the **sub-requirements** are selected, then **Level 1 certification** is **required**.



Manage Employee Certification

In order to manage the employee certifications for a given establishment, click on the **Manage Employee Certs** button.



To edit an existing certification entry you select it from the list, alter the values as desired, and click the **Save** button. If you begin changing values and want to reset everything back to the original values prior to saving, then you may click on the **Reset** button in order to restore the most recently saved values.

In addition to being able to click on the entry in the list, you may also click on the button labelled **First** to go to the first item in the list, **Last** to go to the last item in the list, **Prev** to go to the previous item in the list, or **Next** to go to the next item in the list.

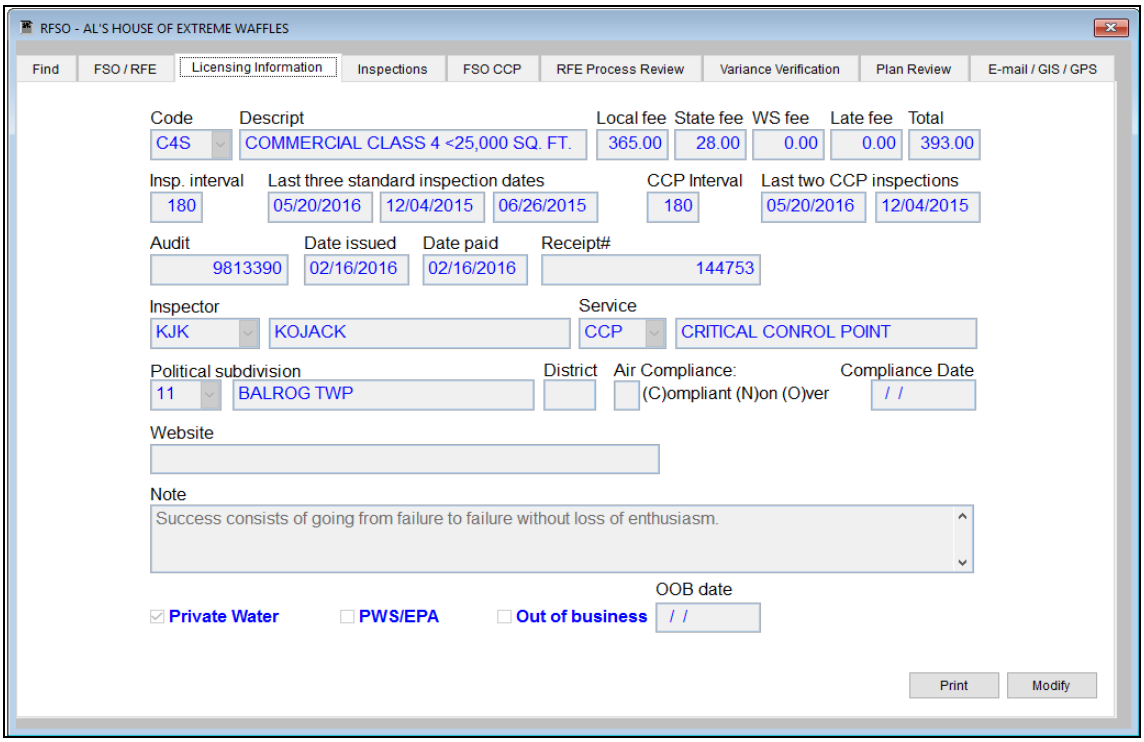
To create a new certification entry, you click on **Add**, fill in the desired values on the subsequently displayed record, then click on save.

To mark a record as deleted, click on the **Delete** button. It is important to remember two things about the behavior of **Delete** on this screen:

1) You should not delete a record that has been valid in the past. Rather instead, if an employee has left the establishment, you should uncheck the box marked **active** and save the record.
2) When you click on the **Delete** button you are telling HDIS to ignore this record, but you are not removing the data from the database.

You are required to specify the **Active** status- (Checked by default), the First Name, the Last Name, and the Cert Number. Other fields are optional.

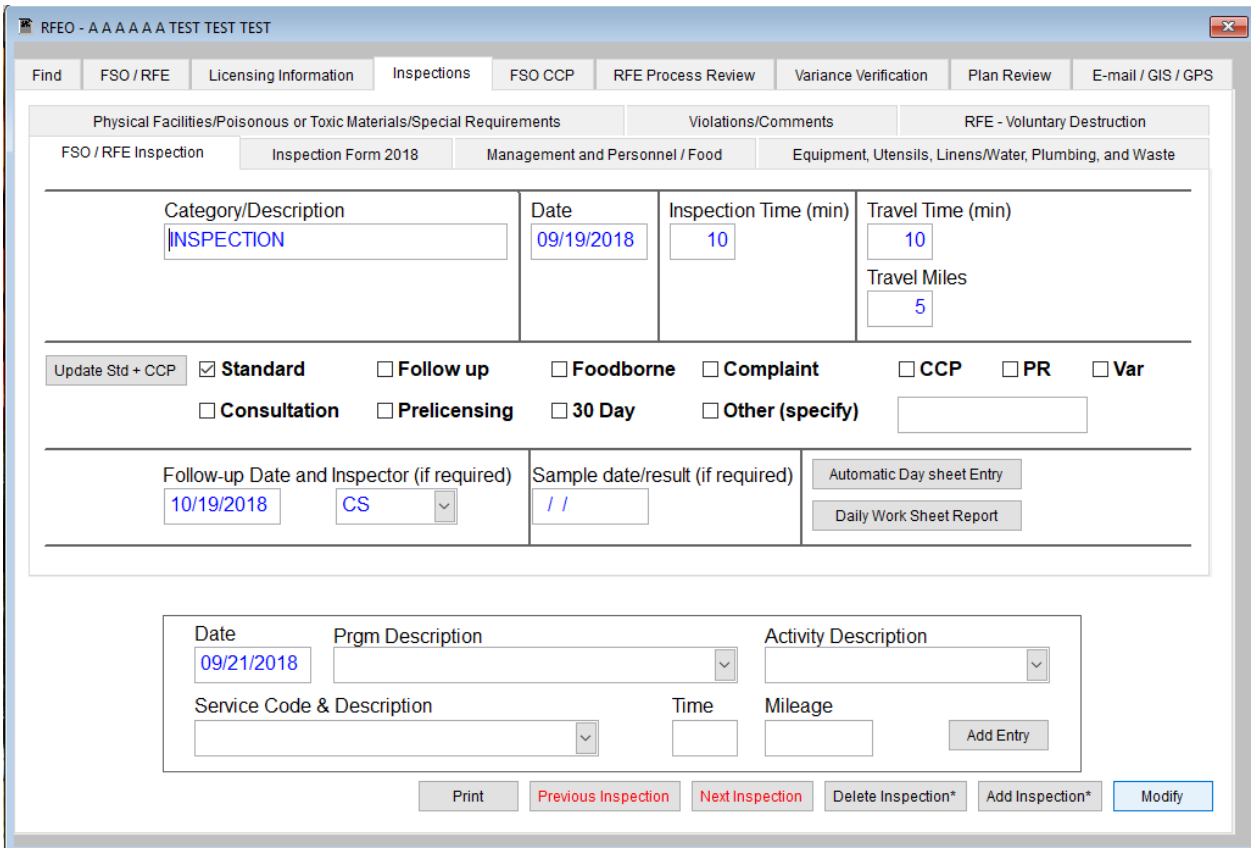
Licensing Information Tab



Field/Button	Description
Code	Chose the fee code for the FSO/RFE
Description	(filled out once fee code is selected)
Local Fee	(filled out once fee code is selected)
State Fee	(filled out once fee code is selected)
WS Fee	If you check the Private Water check box, a water fee will appear if you have defined one in the fee table.
Late Fee	(filled out by running delinquent letters)
Total	(filled out once fee code is selected)
Inspection Interval	(filled out once fee code is selected)
Last Three Inspection Dates	Enter your last three inspection dates
CCP Interval	(filled out once fee code is selected)
Last two CCP Inspections	Enter your last two critical control point inspection dates
Audit	(filled out once a license fee is printed)
Date issued	Date permit issued

Date Paid	Date the permit was paid
Receipt #	Receipt number for the permit
Inspector	Inspector's code and name
Service	Reason code and description
Political subdivision	Political subdivision code and political subdivision
District	Used only if you have defined districts for Inspectors.
Air Compliance	C = Compliant / N = Non-Compliant / O = Over Compliant
Compliance Date	Enter the date of air compliance
Website	Enter the website for this establishment
Note	Enter your notes
Private Water	Check if the FSO/RFE uses private water
PWS/EPA	The EPA was involved with the private water system on the property
Out of Business	Check if the FSO/RFE 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

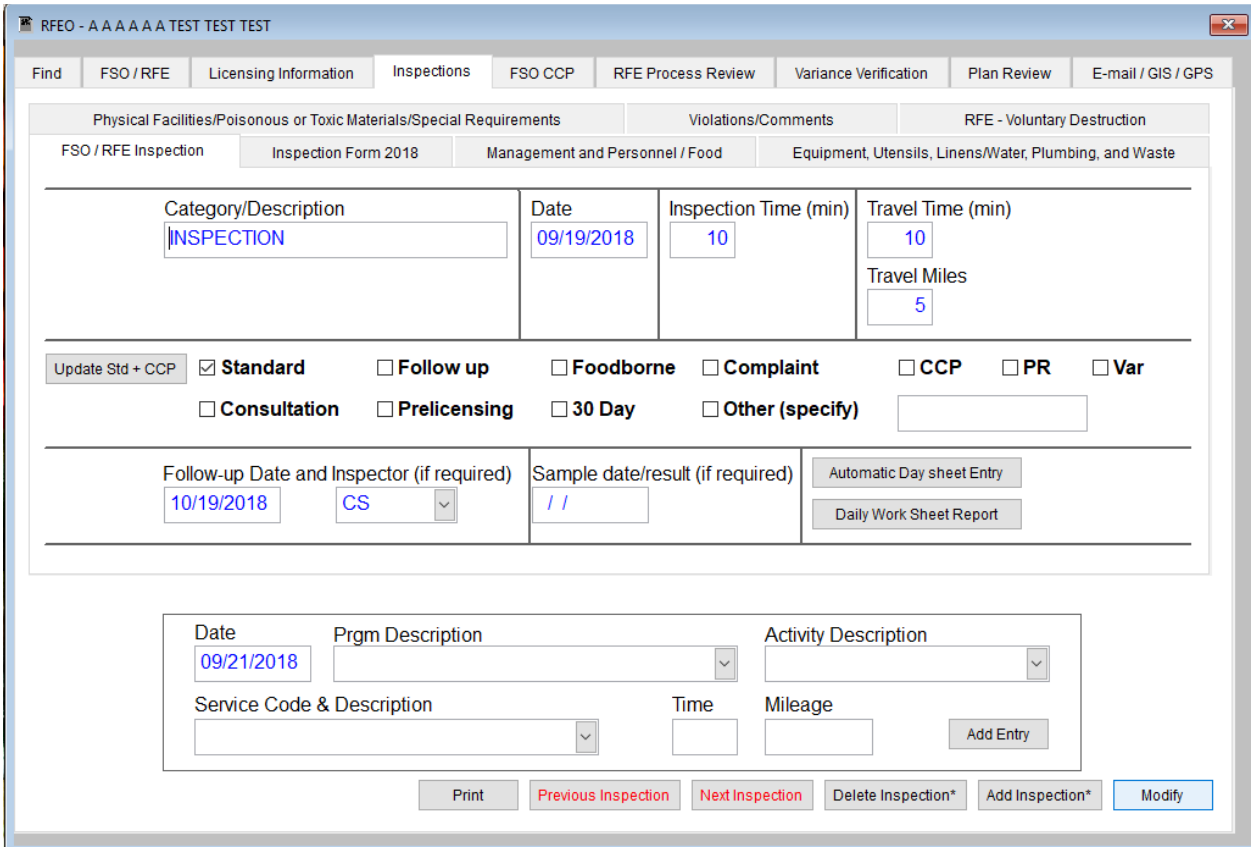
Inspections Tab



To enter a standard inspection, click the **Modify** button

RIGHT click the **Add Inspection** button and enter the inspection date.

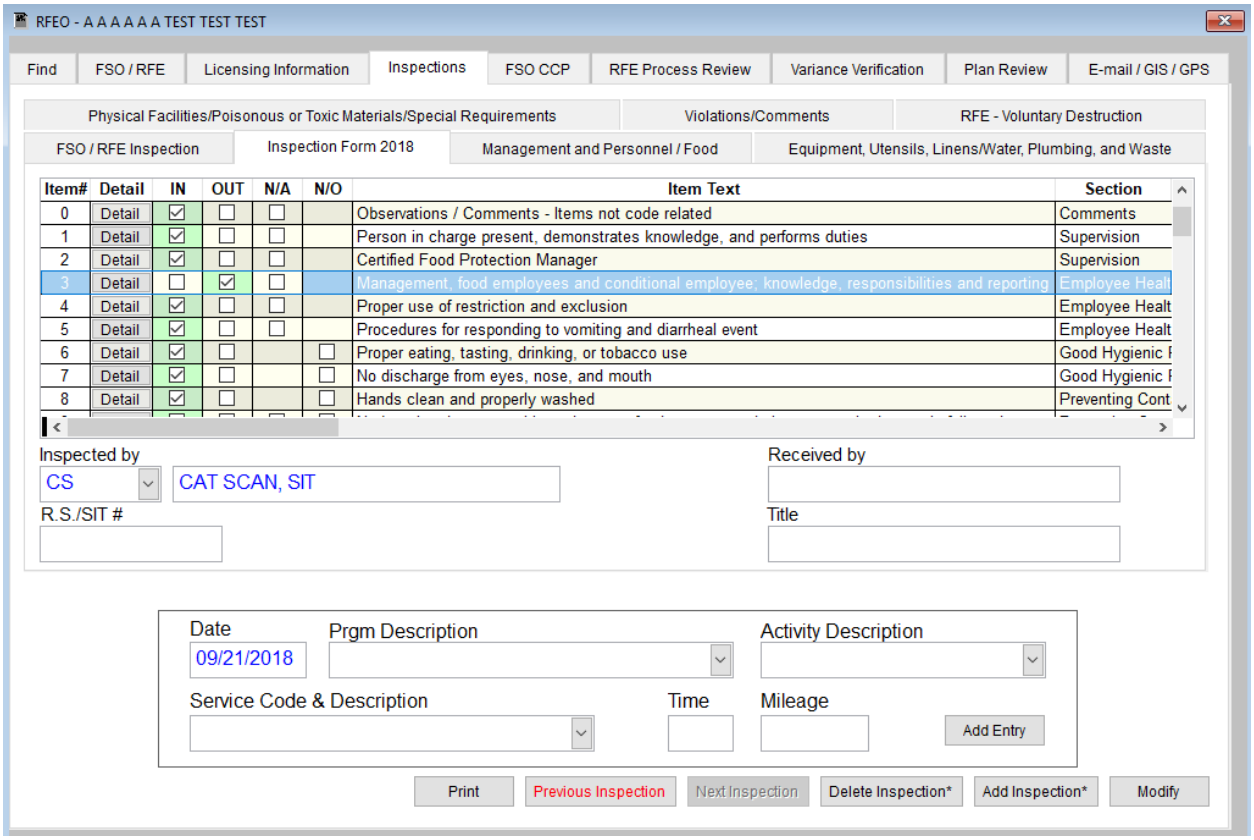
FSO/RFE Inspection



Field/Button	Description
Category/Description	Automatically filled out
Date	Enter the date of the inspection
Inspection Time (min)	Enter the inspection time in minutes
Travel Time (min)	Enter the travel time in minutes
Travel Miles	Enter the number of miles travelled for this inspection
Standard	Check if this is a standard inspection
Update Button	Click to update the last three inspection dates on the Licensing Information page and last 2 CCP.
Follow up	Check if this is a follow up inspection
Food borne	Check if this is a foodborne inspection
Complaint	Check if this inspection is due to a complaint
Consultation	Check if this is a consultation inspection

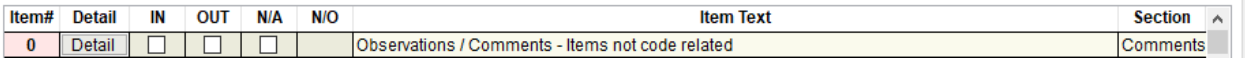
Prelicensing	Check if this is a follow prelicensing inspection
30 day	Check if this is a follow 30 day inspection
Other (specify)	Check if this is an Other type of inspection and enter the kind of inspection in the field to the right.
Follow up Date and Inspector (if required)	Enter the follow up date for an inspection if it is required, along with the inspector
Sample date/result (if required)	Enter the sample date/result if required

Inspection Form 2018

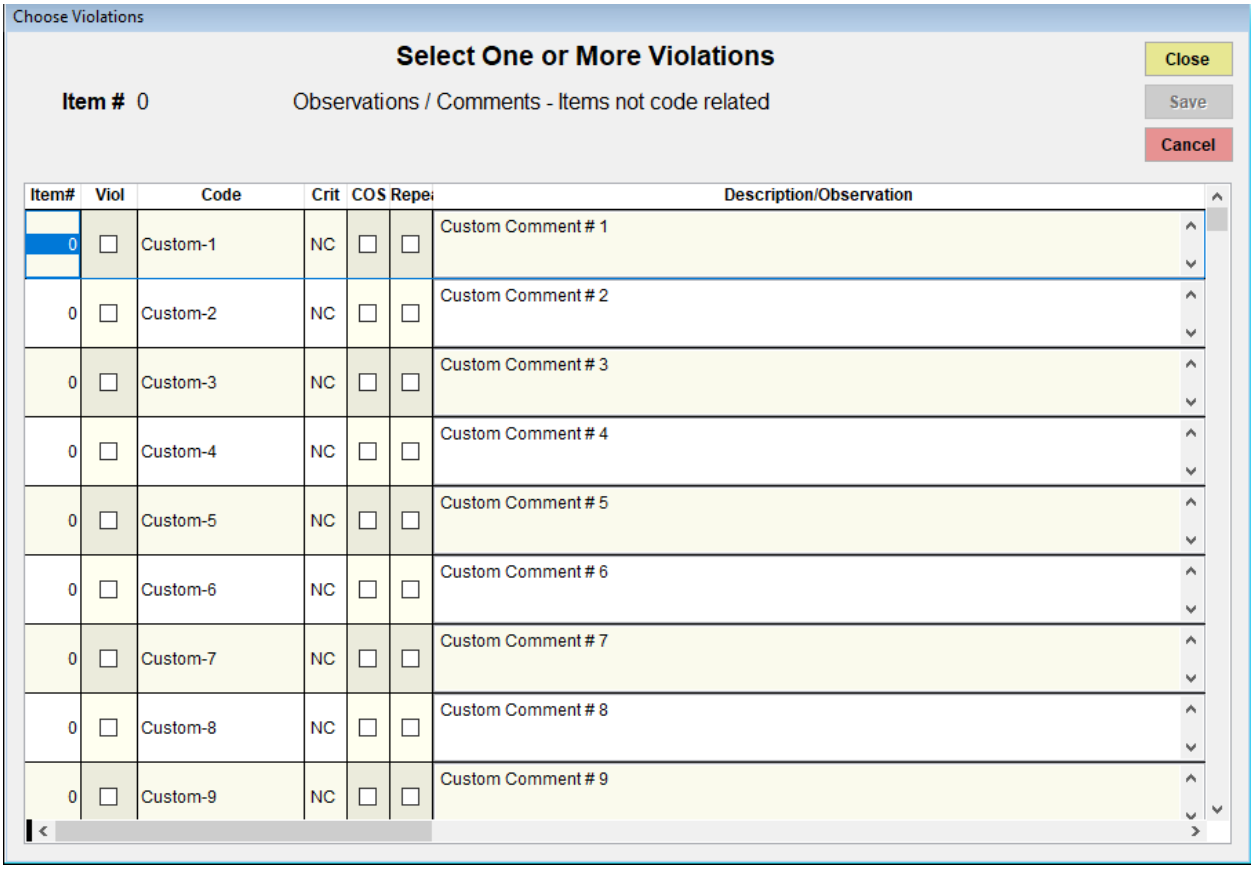


Click the **Modify** button to edit an existing inspection

When you right-click **Add Inspection*** you will notice an **Item# 0** field



Select and use this field to write **Observations** or **Custom comments**


Choose Violations
Select One or More Violations
Close
Save
Cancel
Item # 0
Observations / Comments - Items not code related
Item# Viol Code Crit COS Repe Description/Observation
0 Custom-1 NC Custom Comment # 1
0 Custom-2 NC Custom Comment # 2
0 Custom-3 NC Custom Comment # 3
0 Custom-4 NC Custom Comment # 4
0 Custom-5 NC Custom Comment # 5
0 Custom-6 NC Custom Comment # 6
0 Custom-7 NC Custom Comment # 7
0 Custom-8 NC Custom Comment # 8
0 Custom-9 NC Custom Comment # 9

At any time, even before selecting Modify you are able to click the **Detail** button for any Item # to view information.

Item#	Detail	IN
0	Detail	☐

However, to make any changes, you must click Modify first.
Then, choose an Item#, put a checkmark under the **OUT** column

Item#	Detail	IN	OUT	N/A	N/O
0	Detail	☐	☐	☐	
1	Detail	☐	☑	☐	
2	Detail	☐	☐	☐	
3	Detail	☐	☐	☐	
4	Detail	☐	☐	☐	

When clicking **OUT** another window will pop open and display all of the violations relating to the Item#

Choose Violations

Select One or More Violations

Close | Save | Cancel

Item # 1 Person in charge present, demonstrates knowledge, and performs duties

Item#	Viol	Code	Crit	COS	Repe	Description/Observation
1	☑	3717-1-02.4(A)(1)	C	☐	☐	PIC: Assignment of Responsibility
1	☐	3717-1-02.4(B)(1)	C	☐	☐	PIC: Demonstration of Knowledge - Describing relationship between preventing foodborne illness and employee health
1	☐	3717-1-02.4(B)(4)	C	☐	☐	PIC: Demonstration of Knowledge - Explaining relationship between maintaining proper time/temperature of TCS food and prevention of foodborne illness
1	☐	3717-1-02.4(B)(5)	C	☐	☐	PIC: Demonstration of Knowledge - Explaining hazards involved in consuming raw or undercooked meat, poultry, eggs, fish
1	☐	3717-1-02.4(B)(6)	C	☐	☐	PIC: Demonstration of Knowledge - Stating required temperatures and times for safe cooking of TCS food
1	☐	3717-1-02.4(B)(7)	C	☐	☐	PIC: Demonstration of Knowledge - Stating required temperatures and times for safe storage, holding, cooling, reheating of TCS food
1	☐	3717-1-02.4(B)(8)	C	☐	☐	PIC: Demonstration of Knowledge - Describing relationship between prevention of foodborne illness and management of contamination, hand contact with food, hand washing, and clean facility
1	☐	3717-1-02.4(B)(9)	C	☐	☐	PIC: Demonstration of Knowledge - Identifying major food allergens
1	☐	3717-1-02.4(B)(10)	C	☐	☐	PIC: Demonstration of Knowledge - Explaining relationship between food safety and proper equipment

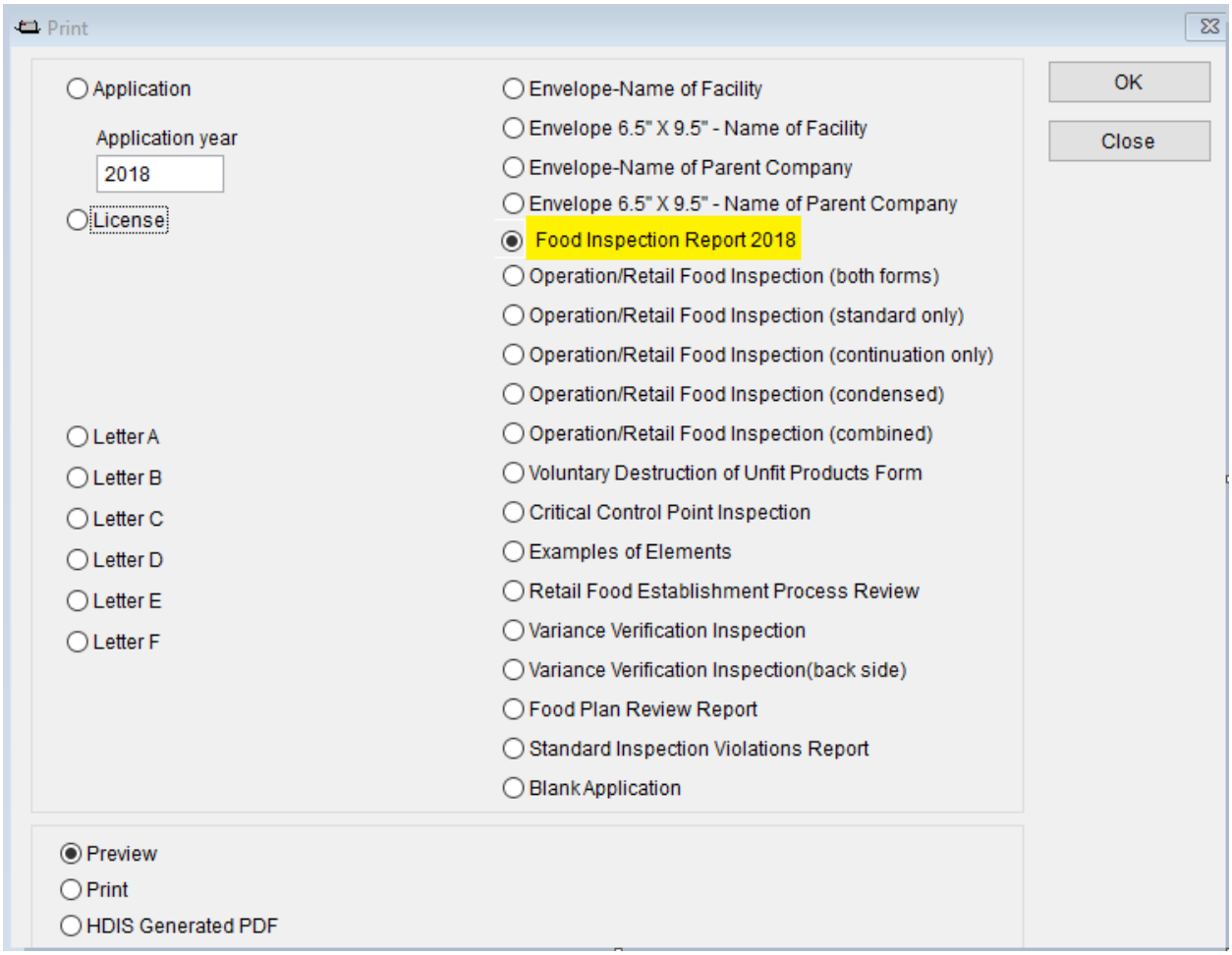
Select the **Violations** you want to add and check-mark any other fields as necessary. Additional comments can be added to any violation in the **Description/Observation** field.

Click **Save** to save your changes and **Close** to close-out

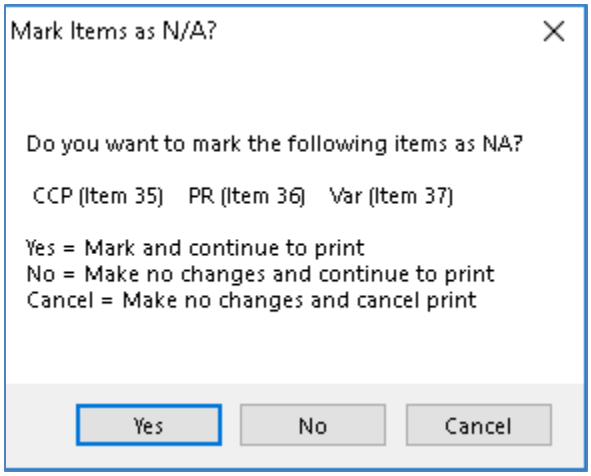
NOTE: You will receive up to two message boxes if items in the 2018 inspection form need marked as either "IN" or "N/A".

Press the **Print** button to print the 2018 Inspection Form.

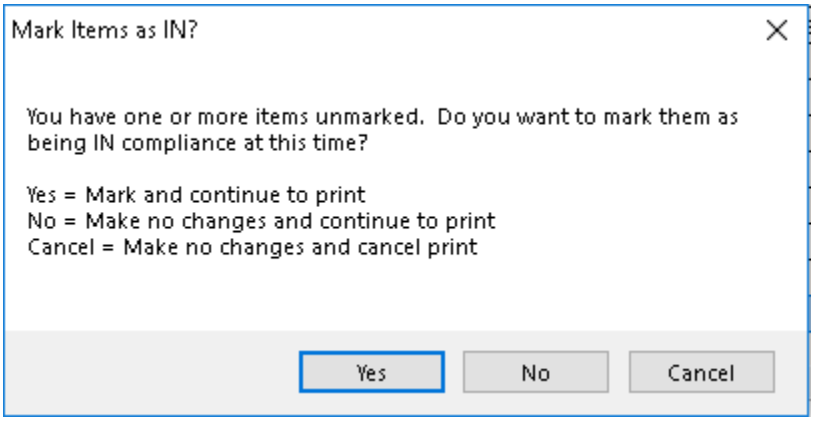
Select the **Food Inspection Report 2018** radio button in order to print your 2018 Food Inspection Report



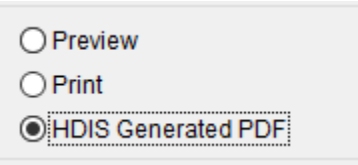
The first message box you may receive is shown below. Click either Yes, No, or Cancel based on the instructions on the screen.

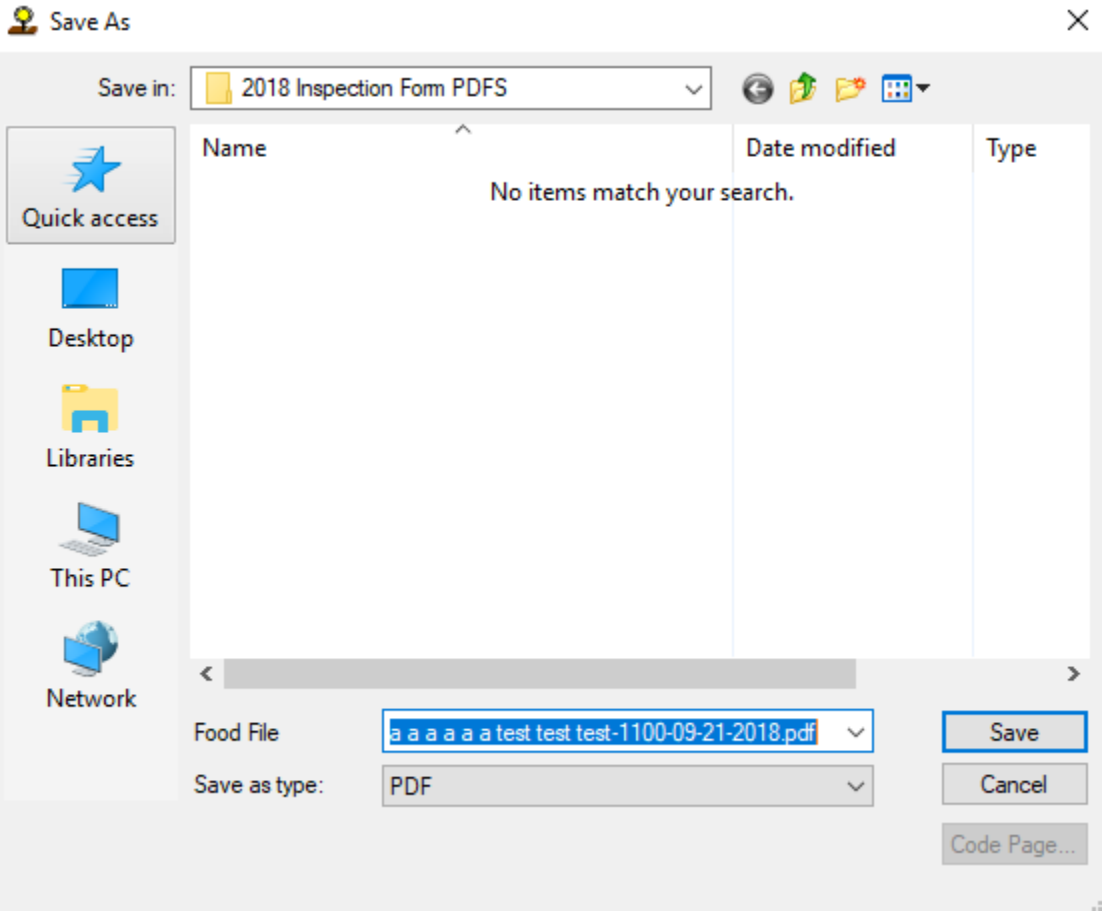


The second message box you may receive is shown below. This allows you to choose to mark non-violation items as "IN" by clicking Yes. Otherwise, click No or Cancel.

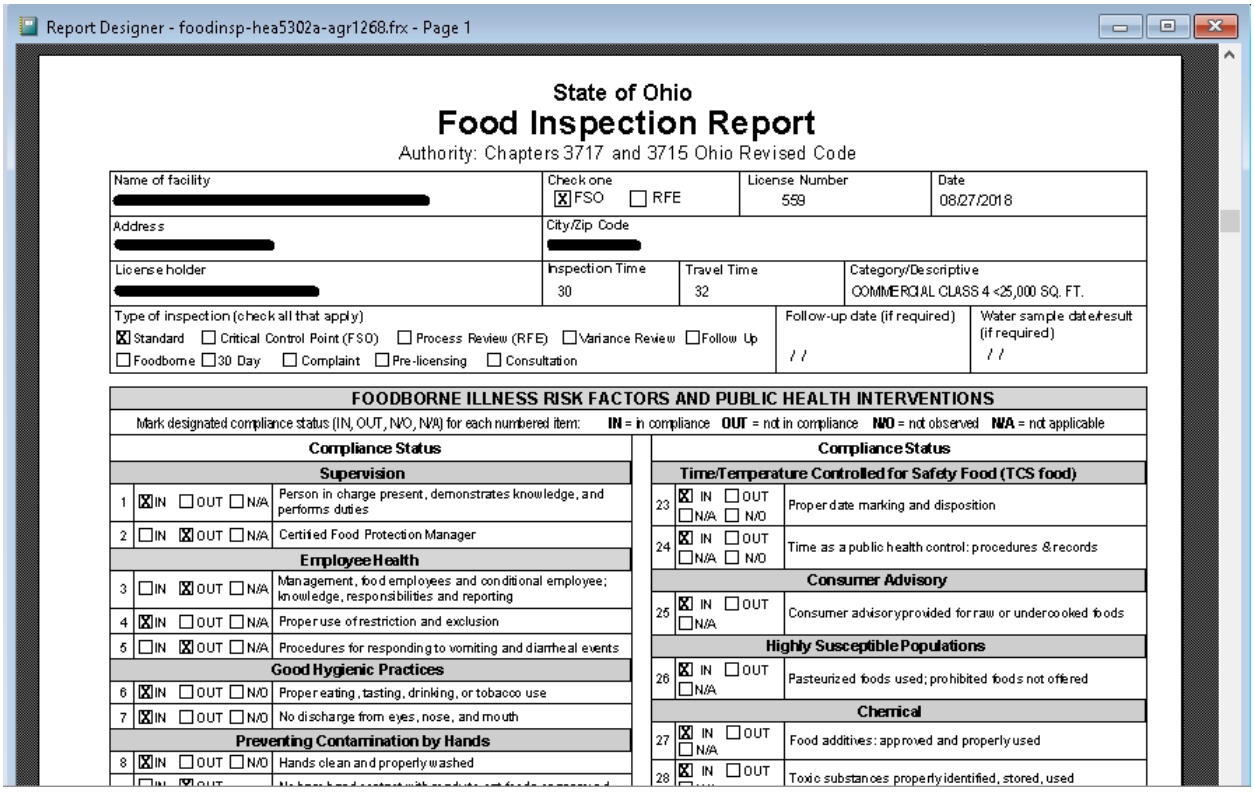


If you select HDIS Generated PDF it will save a PDF file of the Food Inspection Report to the previously set-up file location.





Preview of 2018 Inspection Form:



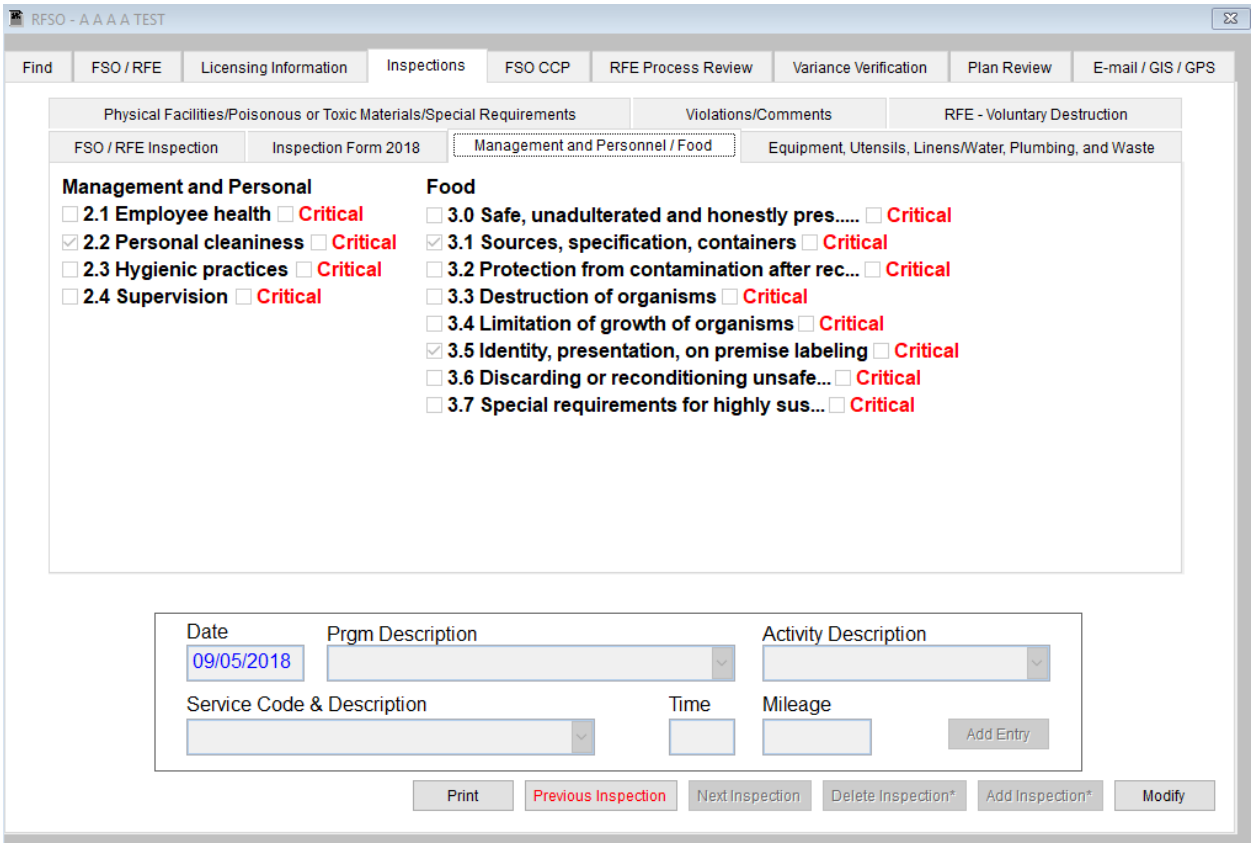
Management and Personnel/Food

To enter a violation, click on the appropriate check box for the violation. In the example above, we are going to click on **Management and Personnel Rule 2.3 Hygienic Practices**.

When the violation is checked, the Food Protection Inspection rules table will open (seen on the next page).

If the violation is **critical**, check the Critical check box before clicking the violation.

This will preface the violation on the Violations/Comments with **Critical Violation.**

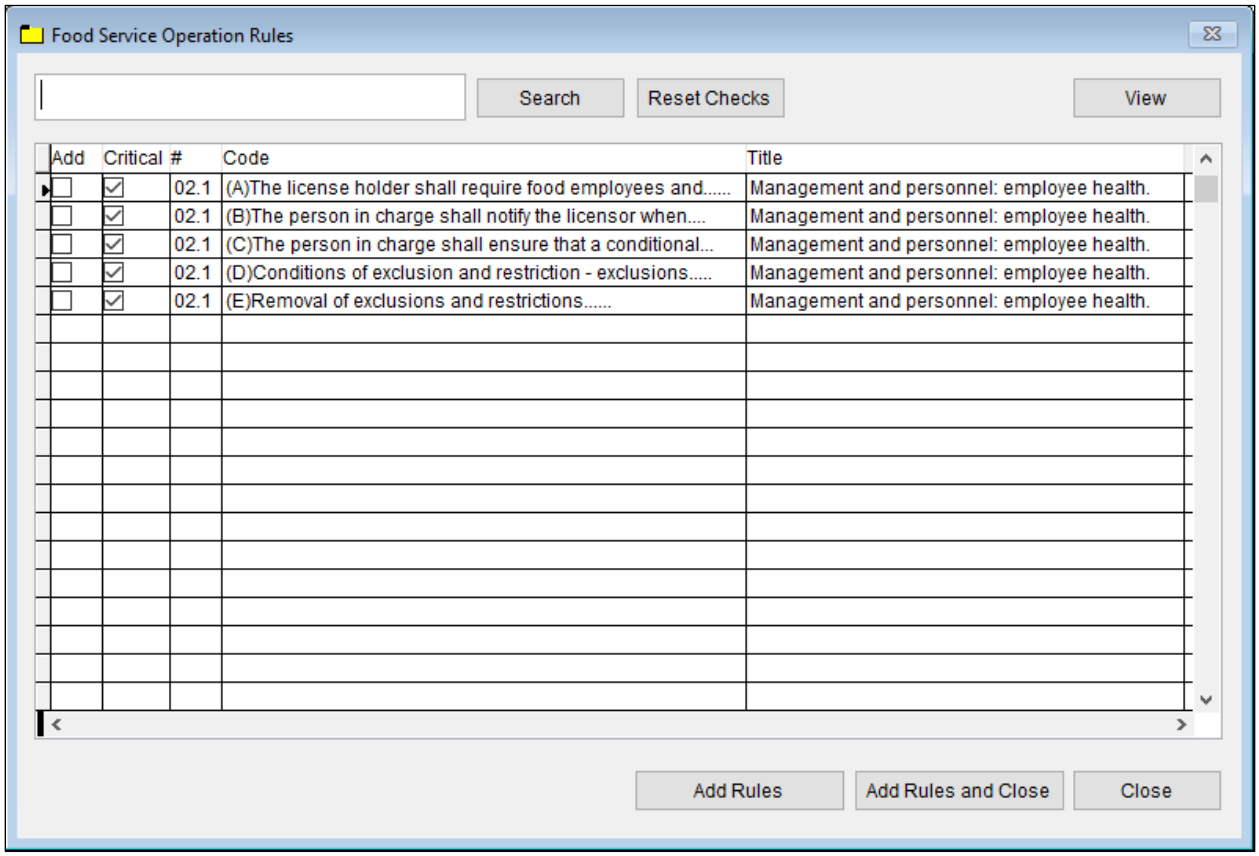


For your inspections, you have the ability to view the rules. Check the box for the appropriate code that was violated to add to your inspection form.

You may also search all 02.3 rules by typing a key word in the field box and clicking the **Search** button.

This will display all rules that the key word has found. You may view a rule by clicking on the row and then clicking the **View** button.

When finished, click the **Add Rules and Close** button.

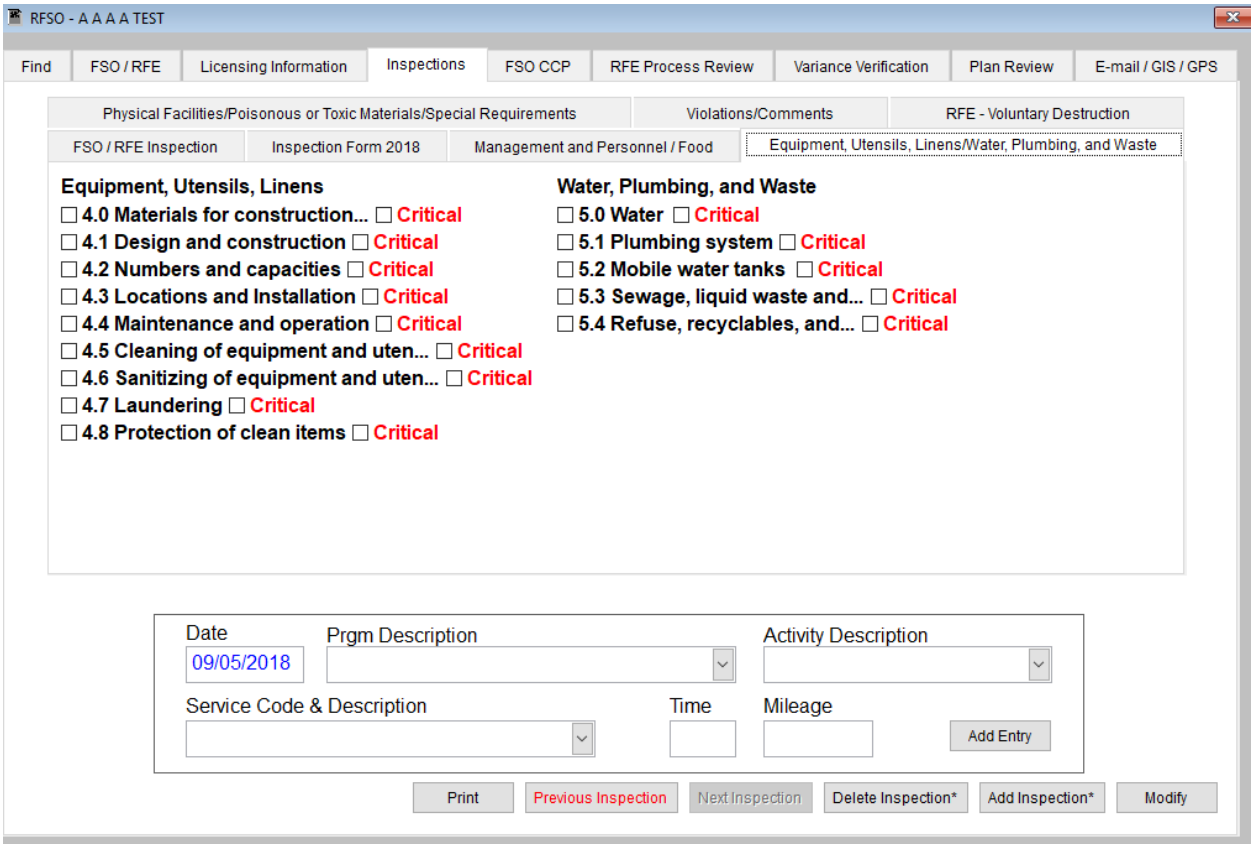


Field/Button	Description
Search	Click to search for a key word entered in the field to the left
View	Click to view the selected rule
Reset Checks	Click to view all rules (used after a search)
Add	Check to add the rule to the inspection form
Add Rules and Close	Click to add the rules to the inspection and to close the rules window
Close	Click to close the rules window

.

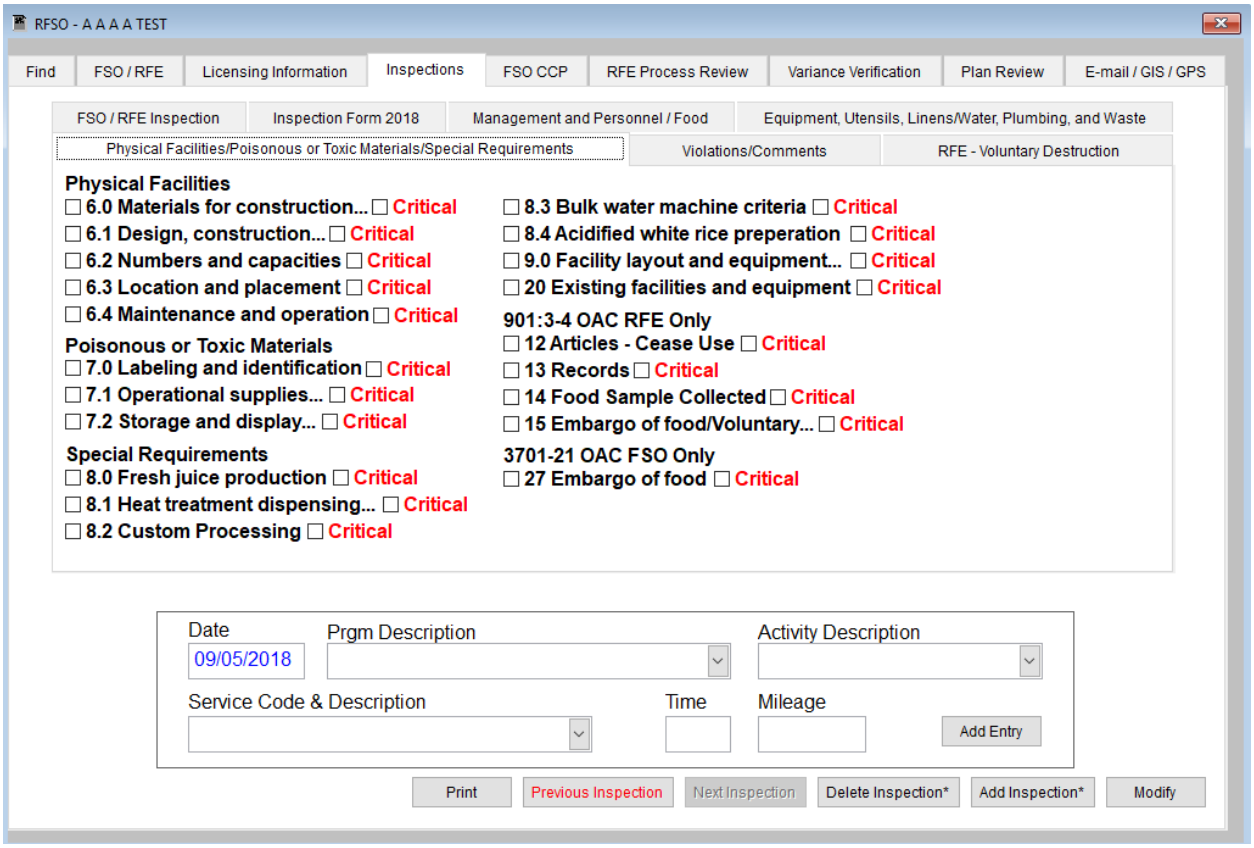
Equipment, Utensils, Linens/Water, Plumbing, and Waste

This page displays rules 4.0 thru 5.4.



Physical Facilities/Poisonous or Toxic Materials/Special Requirements

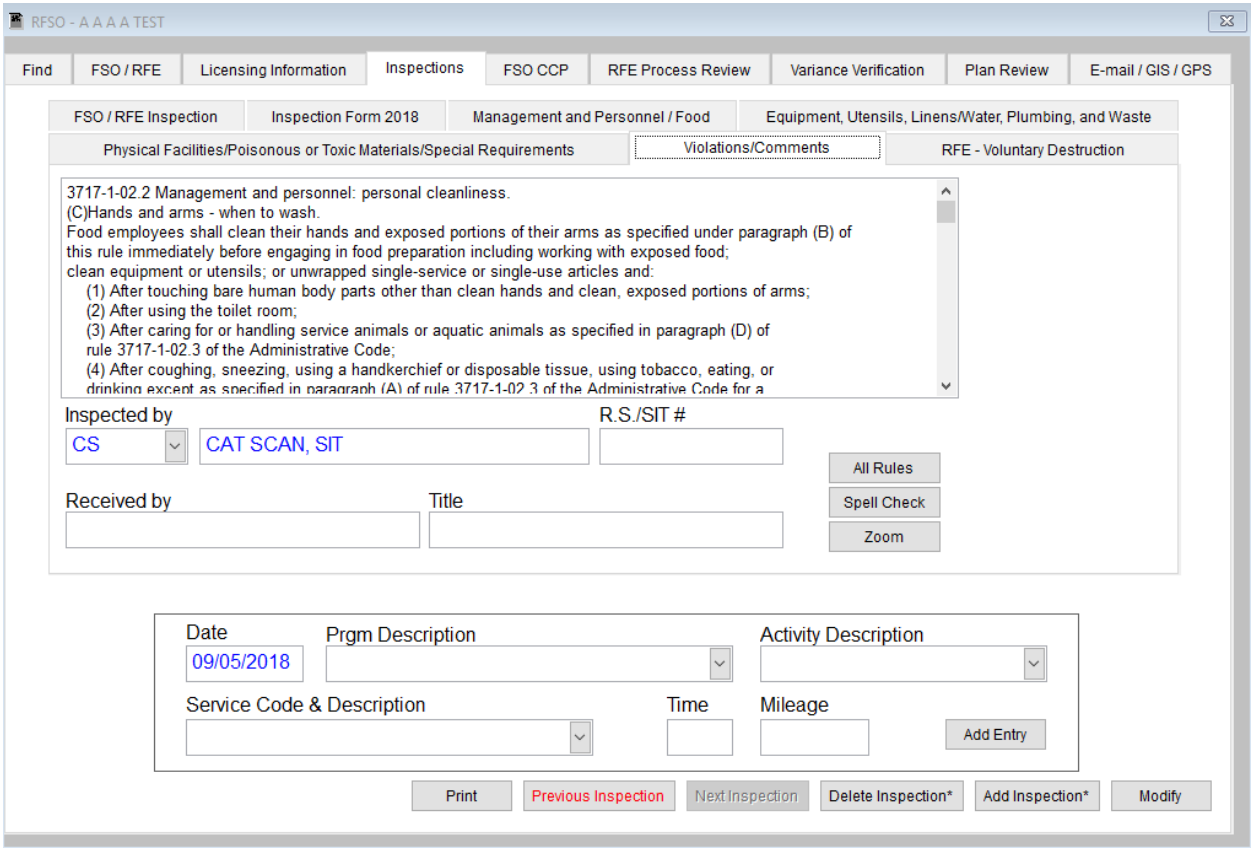
This page displays rules 6.0 thru 27.



Violation(s)/Comment(s)

The **Violations/Comments** page displays the rules that you added.

You may add your own comments specific to the rules.



Field/Button	Description
Violation(s)/Comment(s)	Displays the selected rules from the “Violations” tab along with your comments
Inspected by	Choose the inspector who performed the inspection
R.S./SIT#	Enter the number of the Registered Sanitarian or Sanitarian in Training
Received by	Enter the person who received the inspection form
Title	Enter the title of the person who received the information
All Rules	Click to open all inspection rules
Spell Check	Click to perform a spell check on your comments
Zoom	Click to open the violations/comments in a full screen.

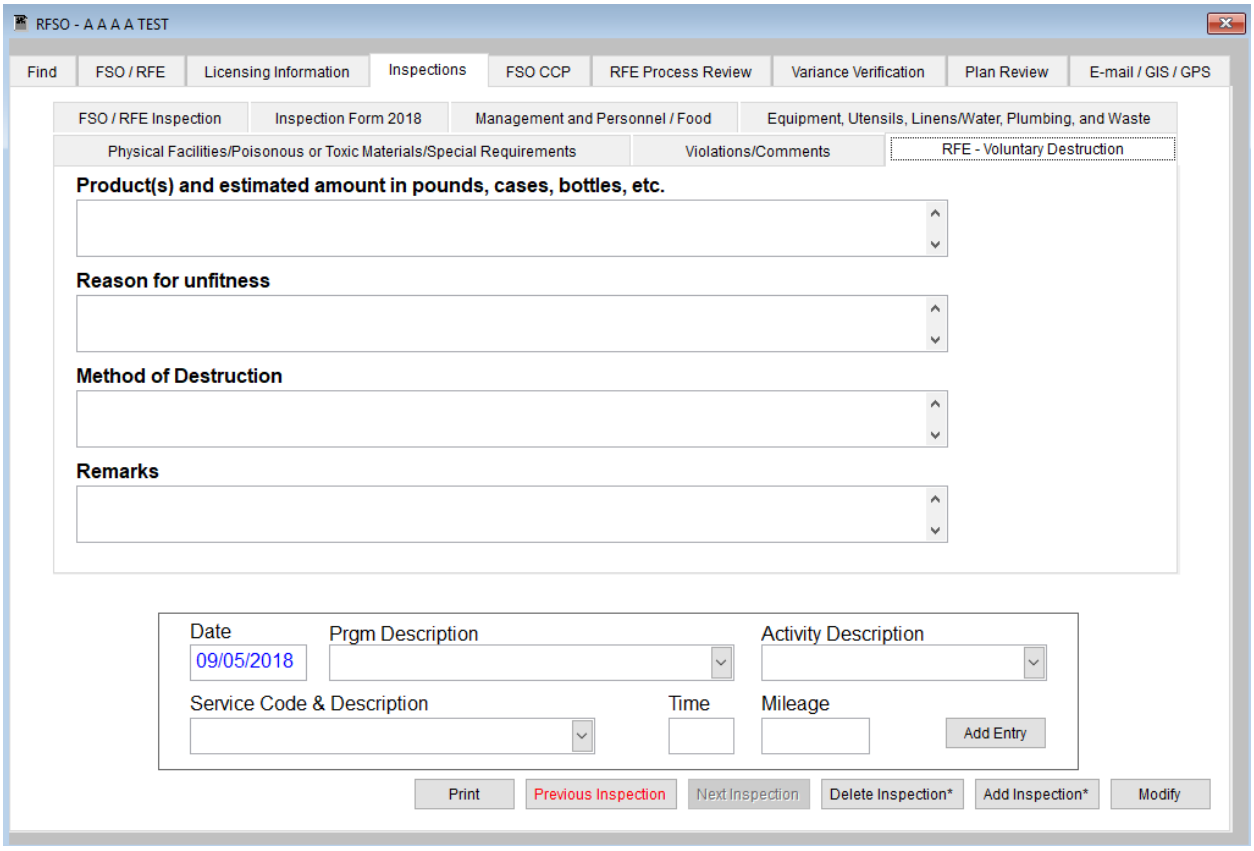
In the Violations/Comments Section:

F2 key will produce squared symbol, F3 key will produce degree symbol

If there are no violations, press **F4** with the cursor in the **Violations and Comments** section and "**No violations at time of inspection**" will appear. You will not have to print out the second page for a standard inspection. A small box will appear on the first Standard Inspection page with that comment in it.

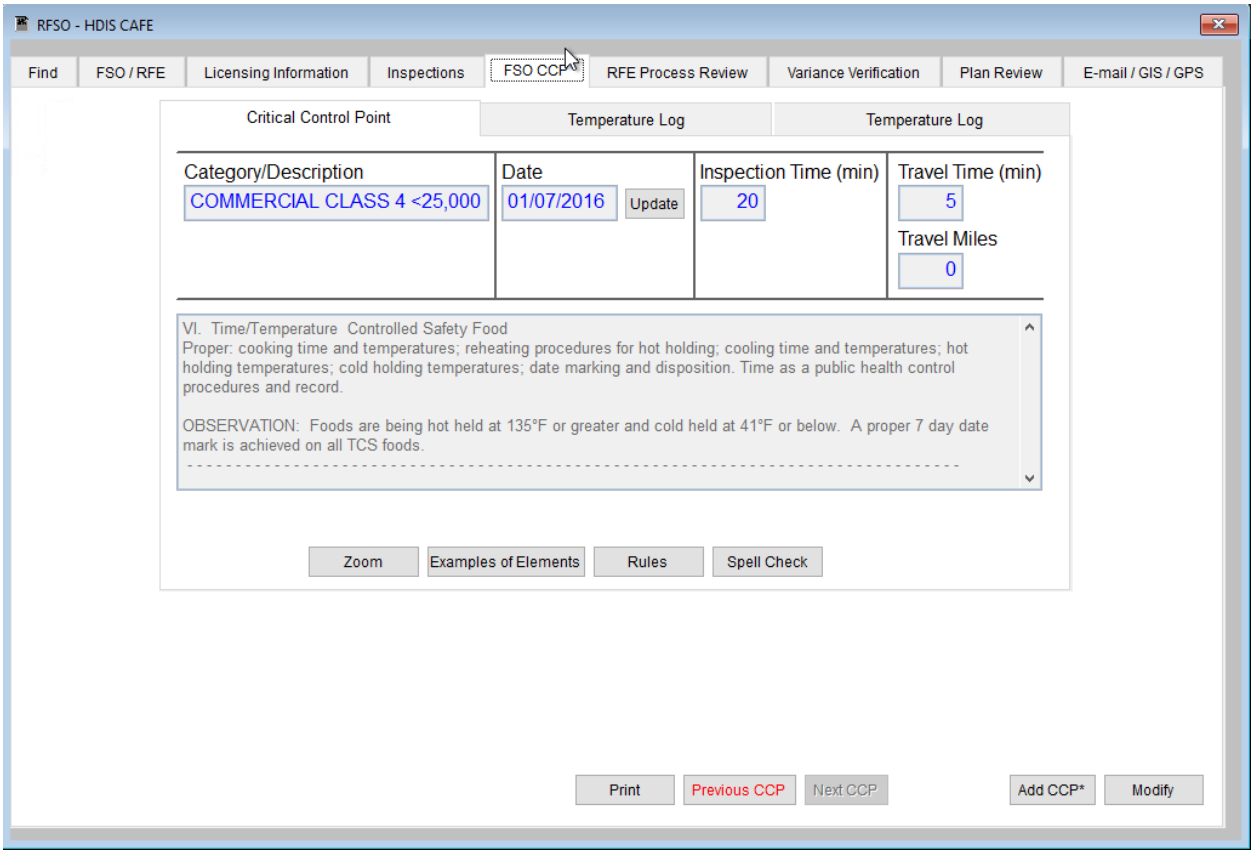
RFE – Voluntary Destruction

On this page, you will enter information on the products that were voluntarily destroyed by the FSO/RFE.



FSO CCP Tab

To enter a critical control point inspection, click the **Modify** button and then RIGHT click the **Add CCP** button.

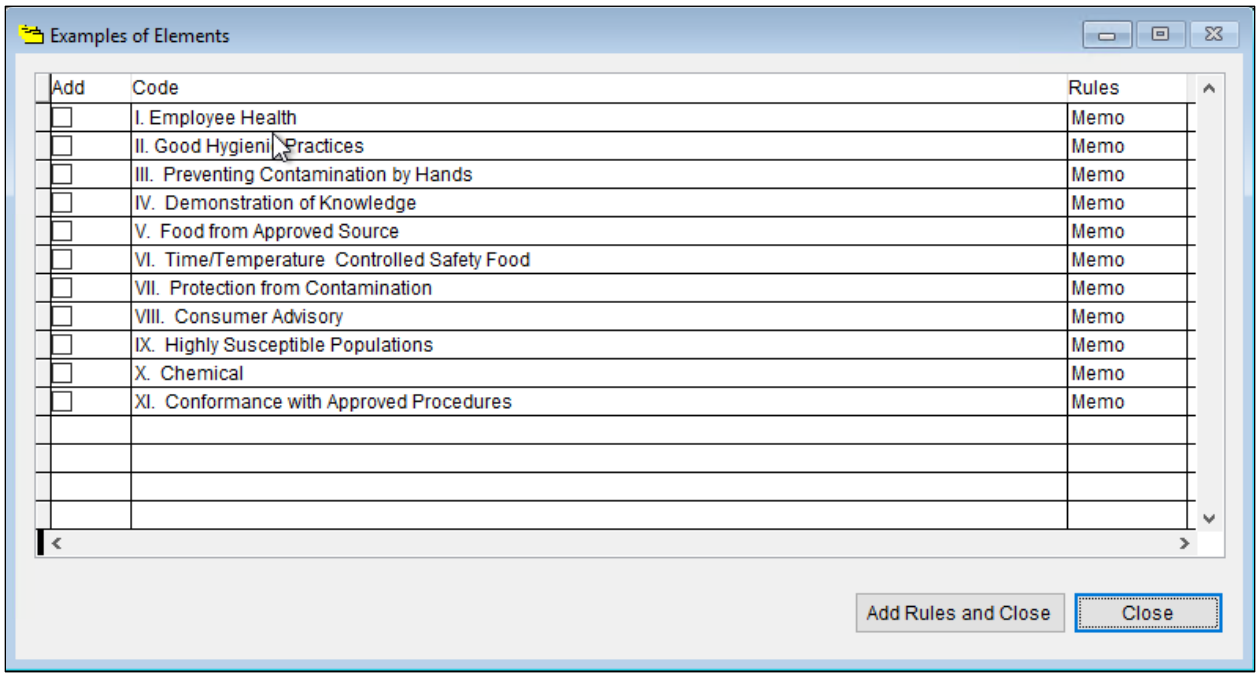


Critical Control Point

Enter the information related to this CCP inspection.

Field/Button	Description
Category/Description	Automatically filled out
Date	Enter the date of the critical control point inspection
Update	Click to update the critical control point inspection dates on the licensing information page
Inspection Time (min)	Enter the inspection time in minutes
Travel Time (min)	Enter the travel time in minutes
Examples of Elements Button	Click to View/Add Examples of Elements
Rules Button	Click to open all inspection rules
Spell Check	Click to perform a spell check on your comments
Delete CCP* Button	To delete this CCP, you must RIGHT click on this button.
Add CCP*	Right click to add another CCP Inspection

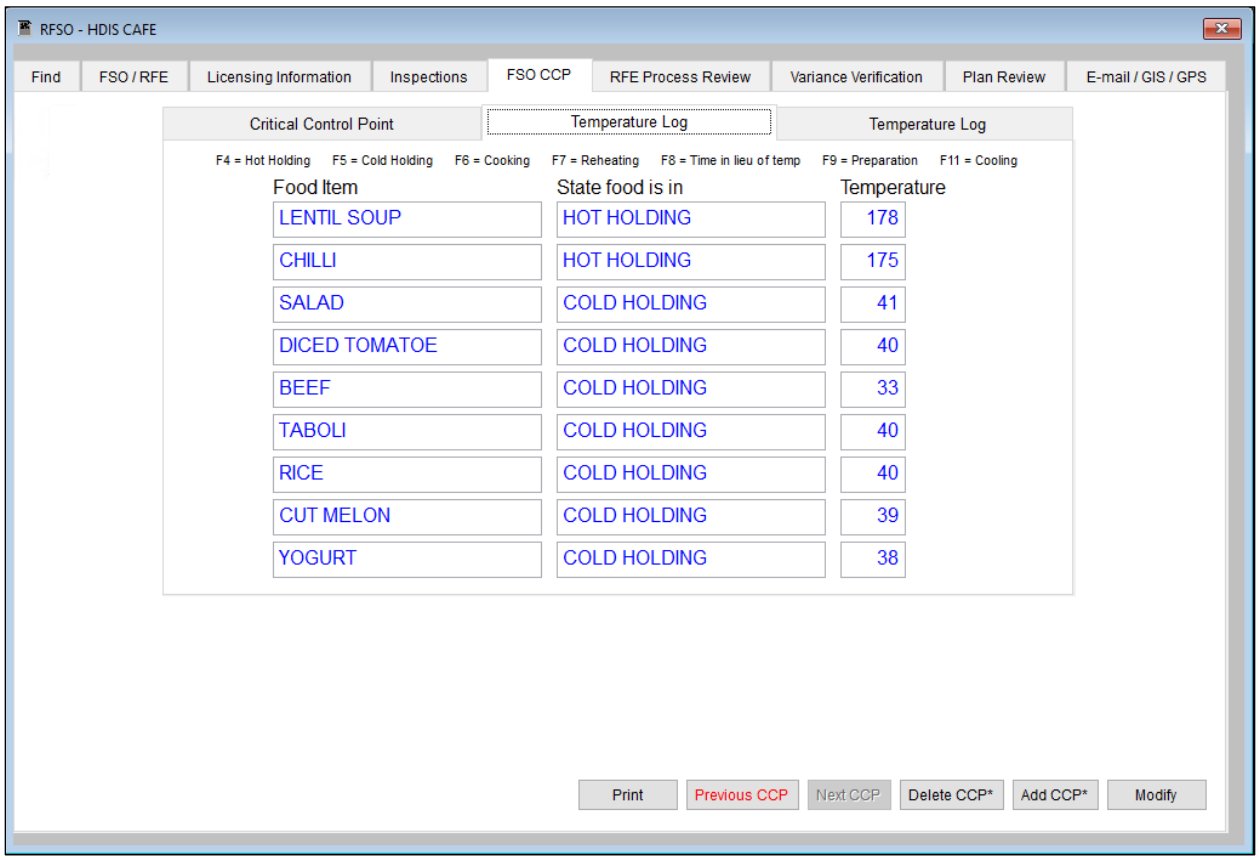
Examples of Elements



The **Examples of Elements button** is similar to the **Rules** button where you can view the elements and add them to your "Violations/Comments" field for your Critical Control Point Inspection.

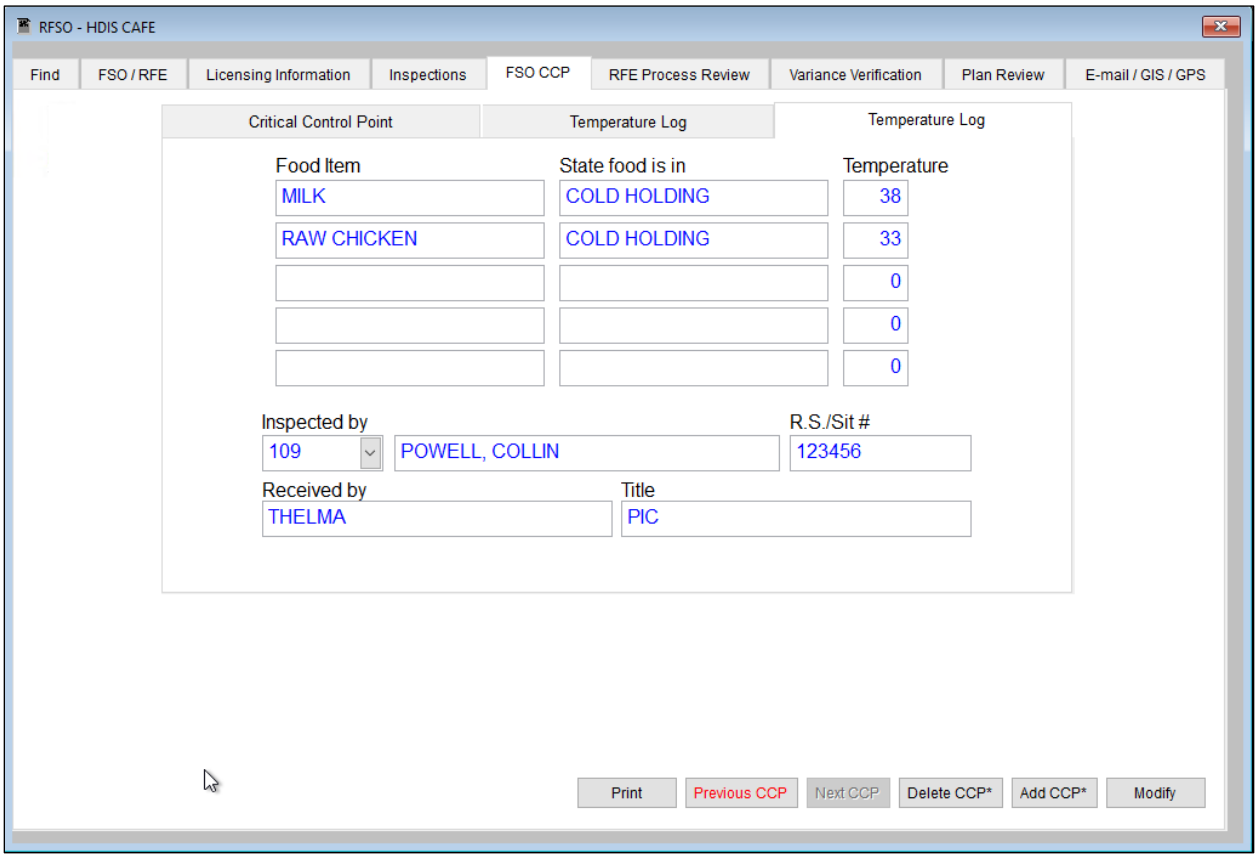
Temperature Log

On this page, you will enter your temperature log on the food items.



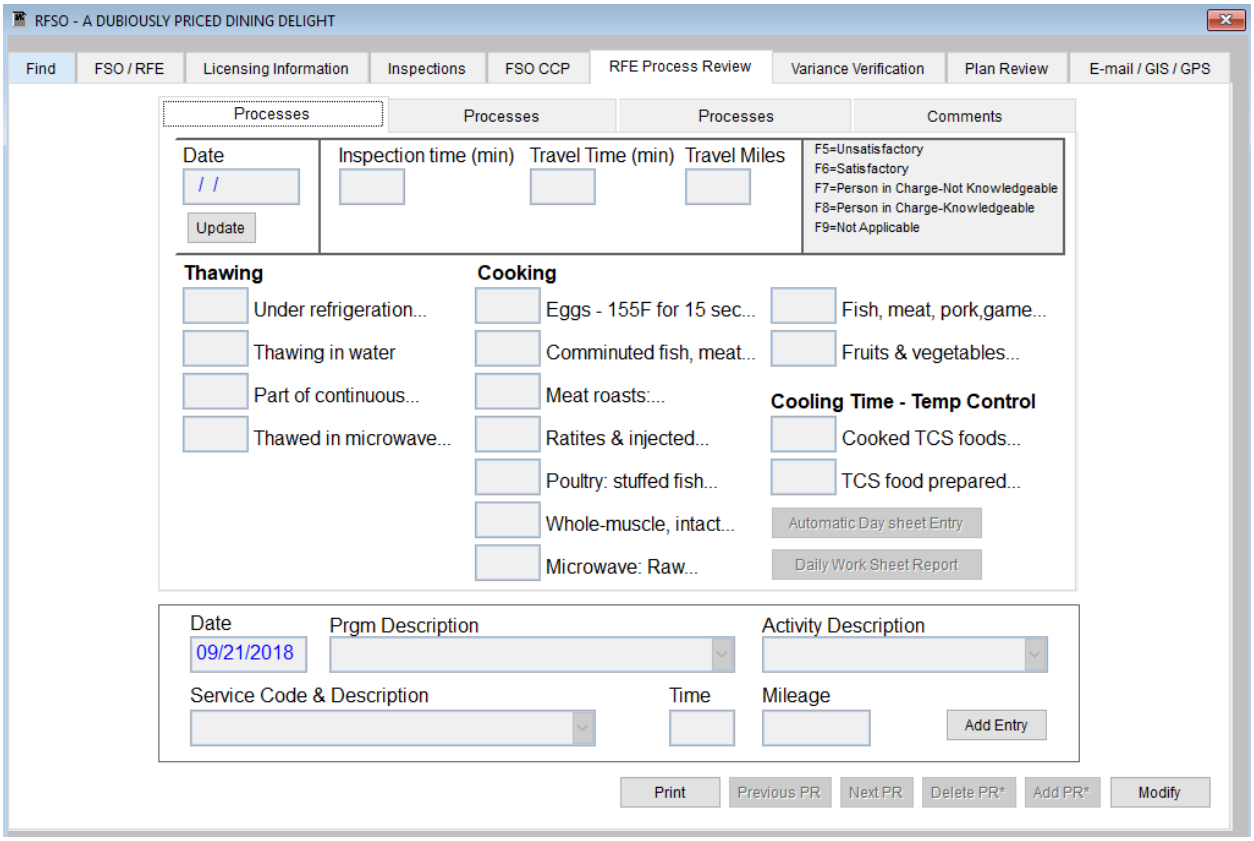
Temperature Log (continued)

On this page, you will enter your continued temperature log on the food items as well as the inspector who performed the critical control point inspection and who received the report.

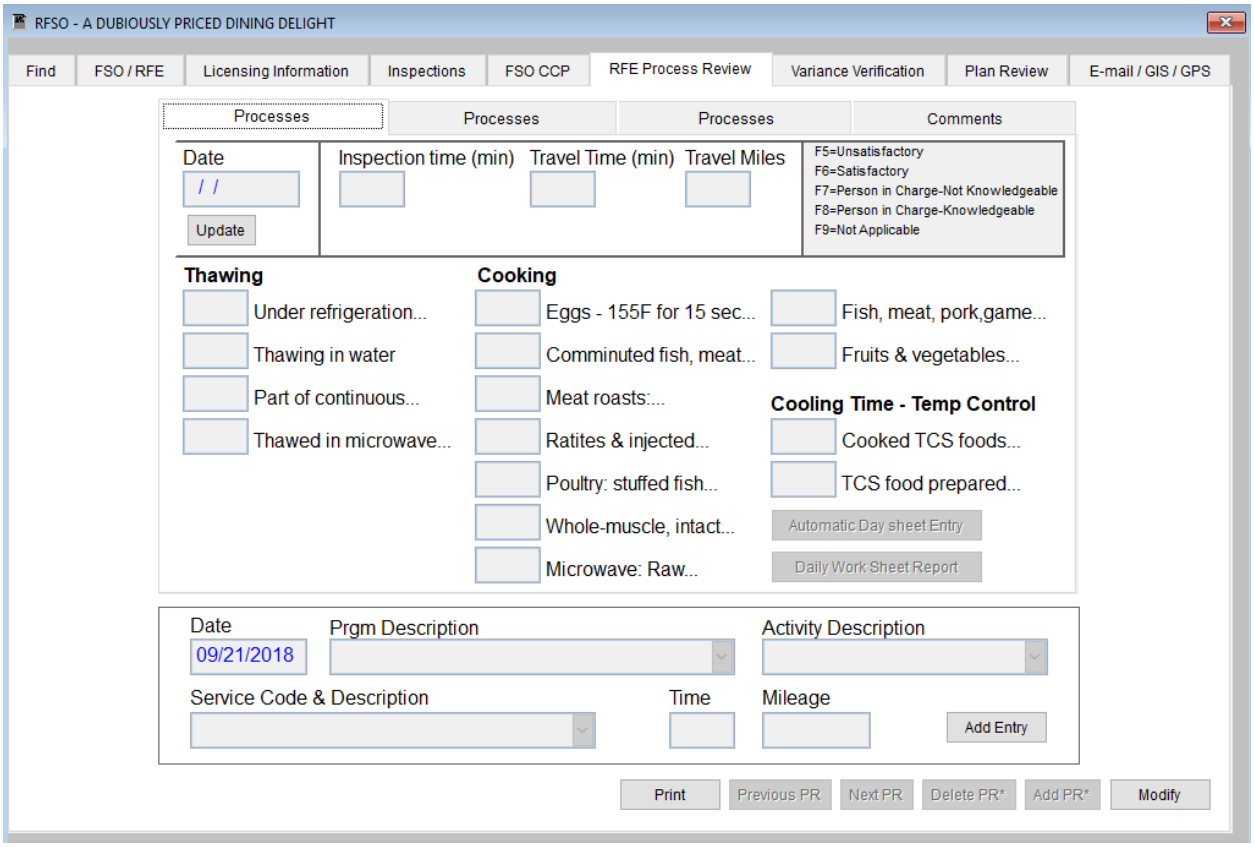


RFE Process Review

To enter a RFE Process Review, click the Modify button and then RIGHT click the **Add PR** button.



Processes – 1

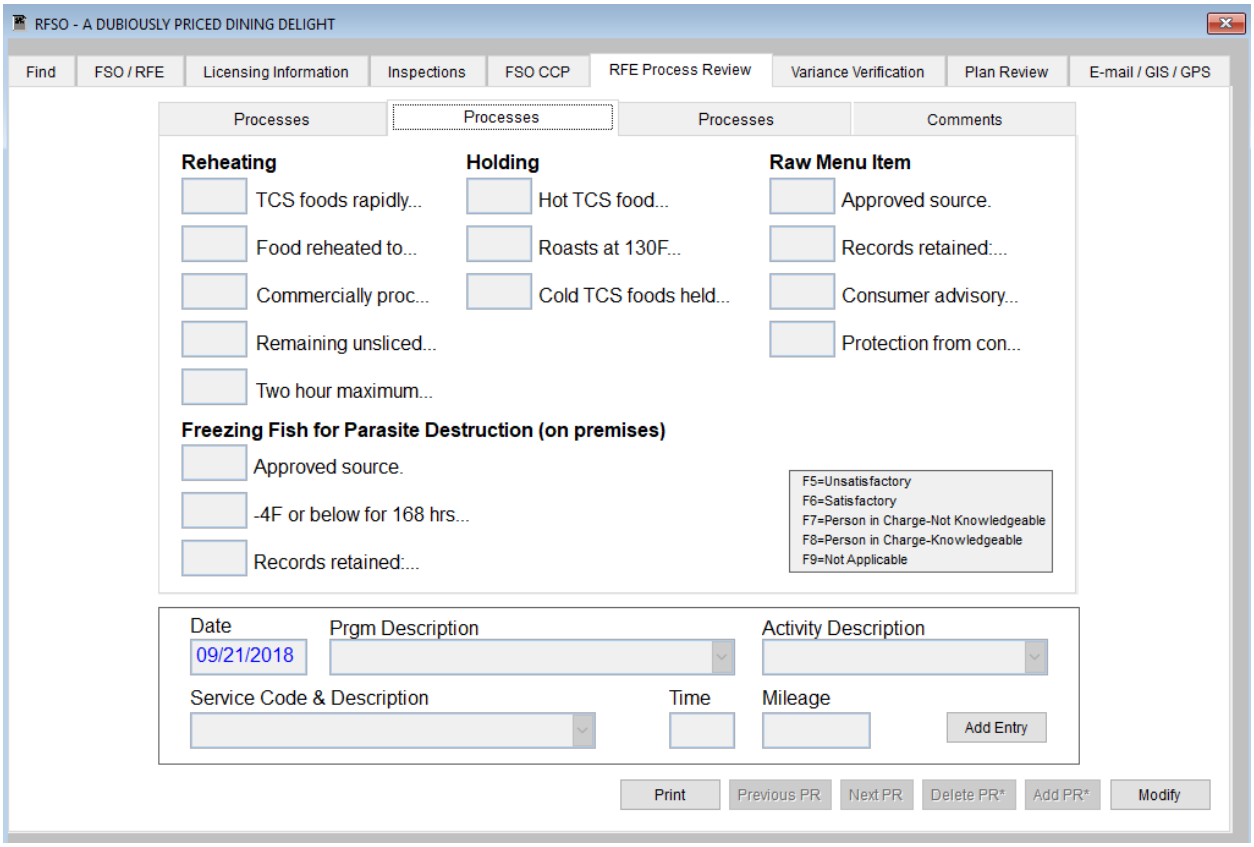


The program affords you the ability to use **hot** or **quick** keys in entering data into the fields for your RFE Process Review as noted below.

Field/Button	**Description**
Date	Enter the date of the process review
Update	Click to update the critical control point inspection dates on the licensing information page
Inspection Time (min)	Enter the inspection time in minutes
Travel Time	Enter your travel time in minutes
Travel Miles	Enter your travel miles
Quick Keys	
F5	Press to enter “U” into the field
F6	Press to enter “S” into the field
F7	Press to enter “U-PIC” into the field
F8	Press to enter “S-PIC” into the field
F9	Press to enter “N/A” into the field

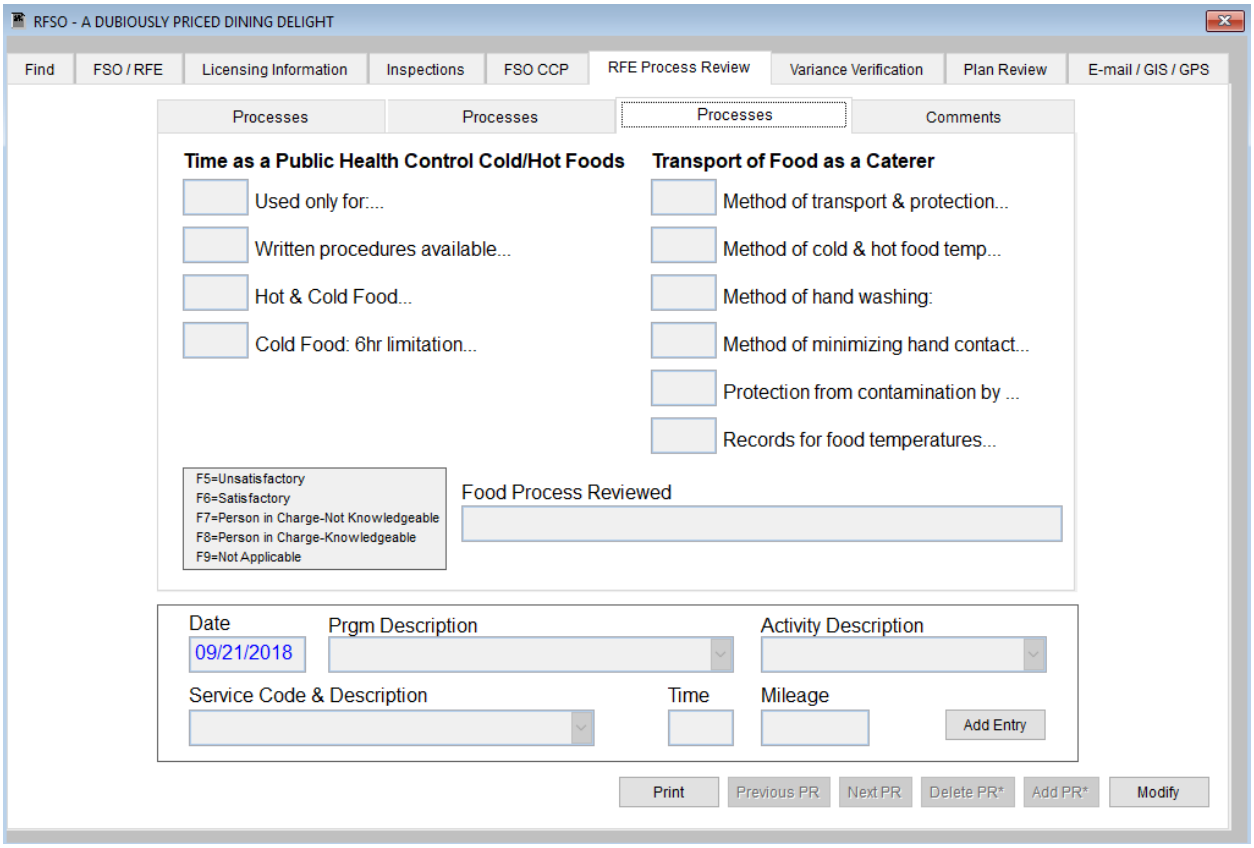
Processes -2

Continue entering your Process Review information.



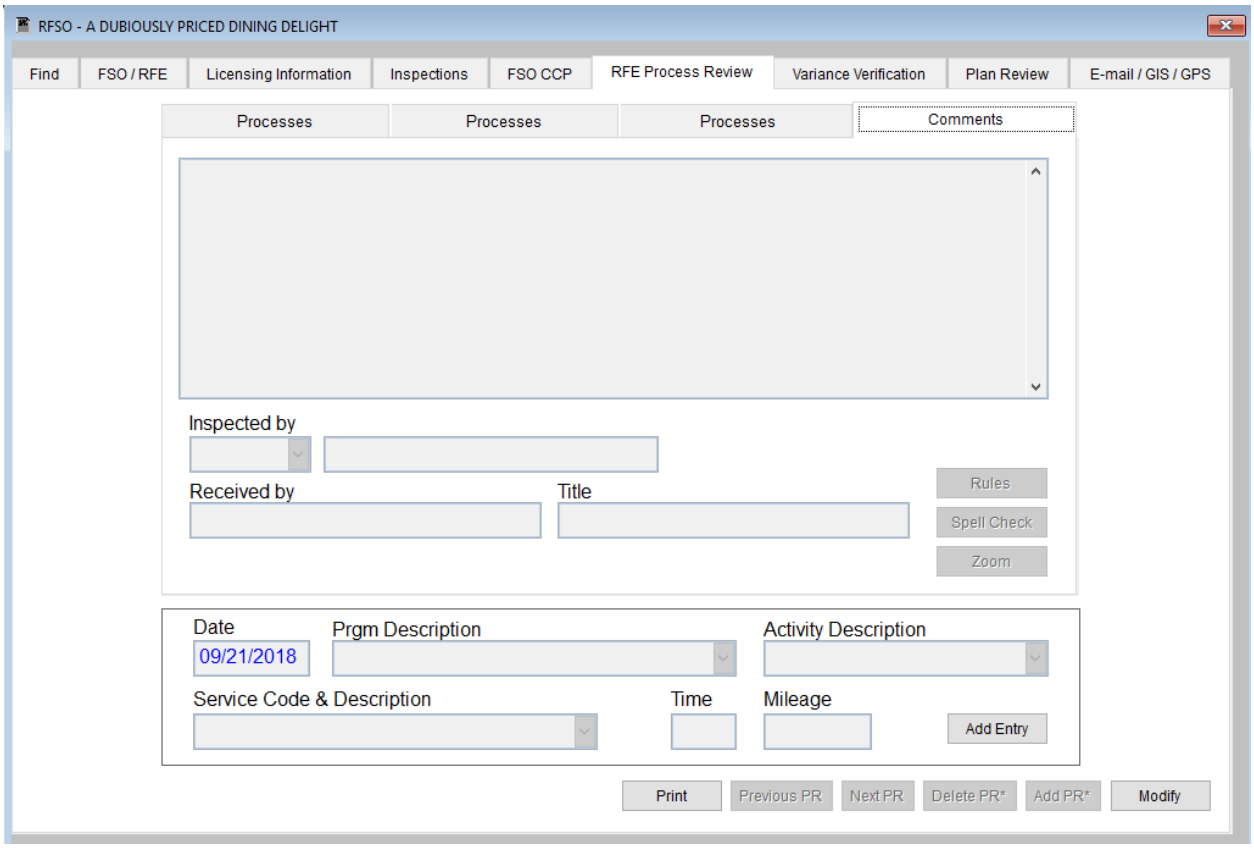
Processes - 3

Continue entering your Process Review information.



Comments

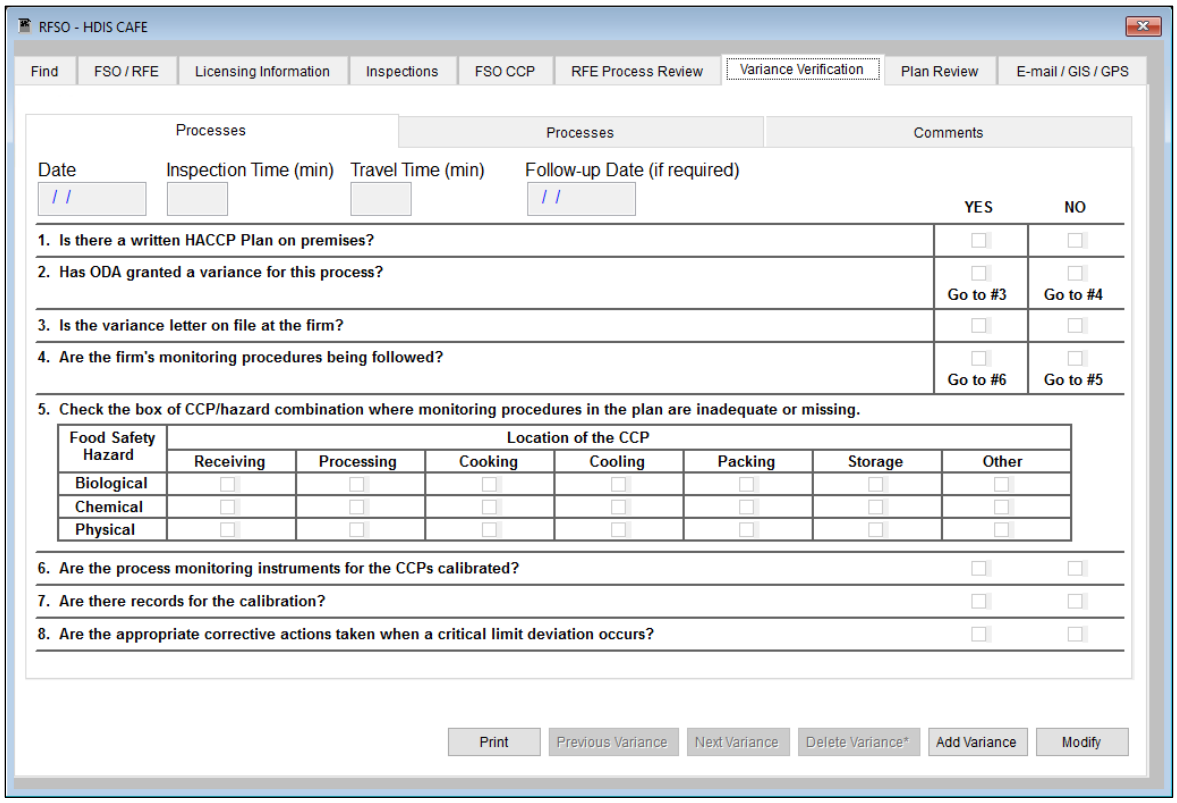
On this screen, you can enter your comments on the Process Review and the food inspection rules that apply. Also, be sure to fill out the Inspector's name and who received the report.



Variance Verification

This screen is to be used to enter information regarding Hazard Analysis and Critical Control Points.
To enter a variance, first click **Modify**, then click **Add Variance**.

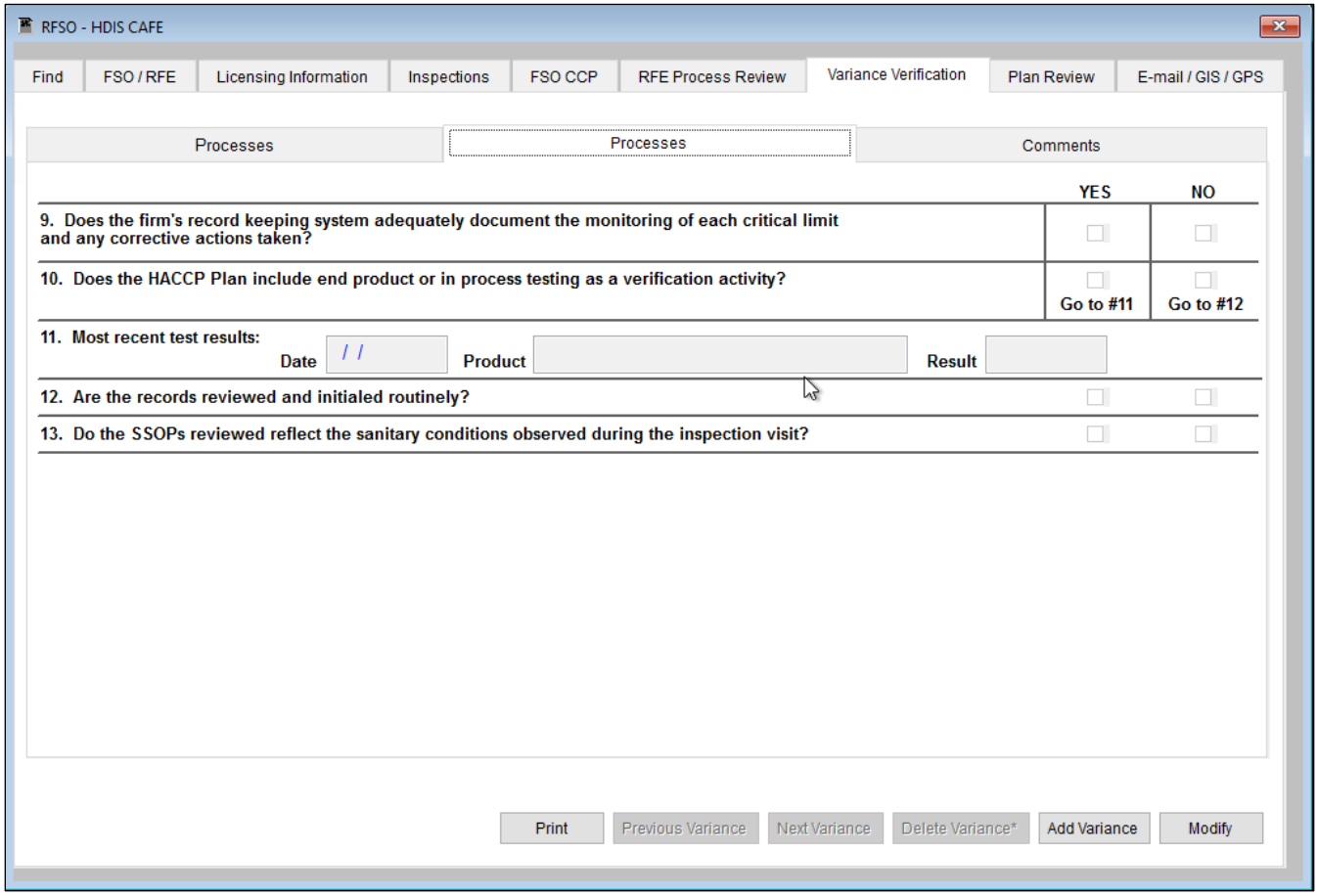
Processes-1



Field/Button	Description
Date	Enter the date of the variance inspection
Inspection Time	Enter the inspection time in minutes
Travel Time	Enter the travel time in minutes
Follow-up Date (if required)	Enter the date a follow-up is needed (if required)
Is there a written HACCP Plan on premisis?	Check Yes or No
Has ODA granted a variance for this process?	Check Yes or No. If Yes, go to question #3. If No, go to question #4.
Is the variance letter on file at the firm?	Check Yes or No
Are the firm's monitoring procedures being followed?	Check Yes or No
Check the box of CCP/hazard combination where monitoring procedures in the plan are inadequate	Mark each box as appropriate

or missing.	
Are the process monitoring instruments for the CCPs calibrated?	Check Yes or No
Are there records for the calibration?	Check Yes or No
Are the appropriate corrective actions taken when a critical limit deviation occurs?	Check Yes or No

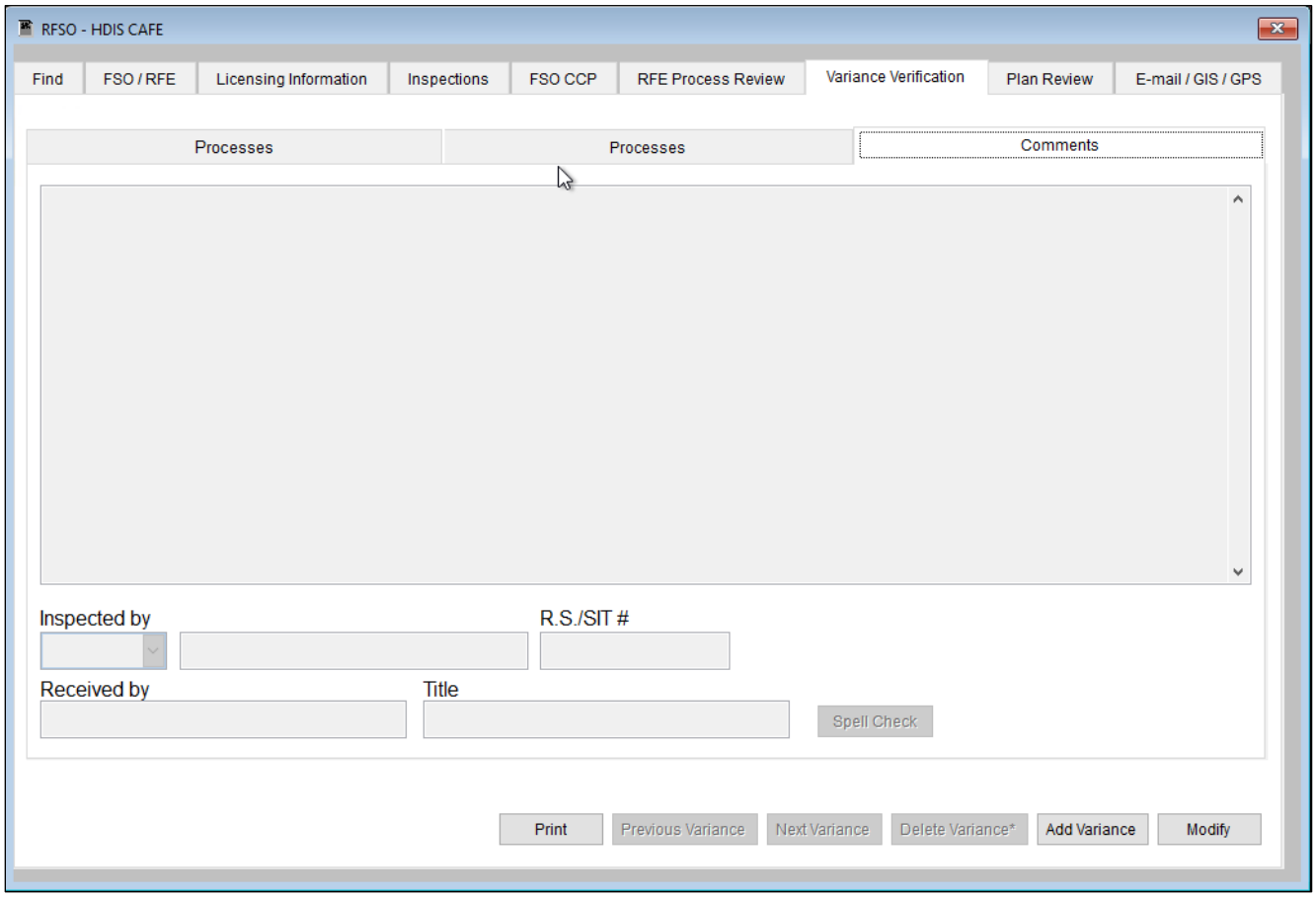
Processes-2



Field/Button	Description
Does the firm's record keeping system adequately document the monitoring of each critical limit and any corrective actions taken?	Check Yes or No
Does the HACCP Plan include end product or in process testing as a verification activity?	Check Yes or No. If Yes, go to question #11. If No, go to question #12.
Most recent Test Reults	Enter the Date, Product and Result
Are the records reviewed and initialed routinely?	Check Yes or No
Do the SSOPs reviewed reflect the sanitary conditions observed during the inspection visit?	Check Yes or No

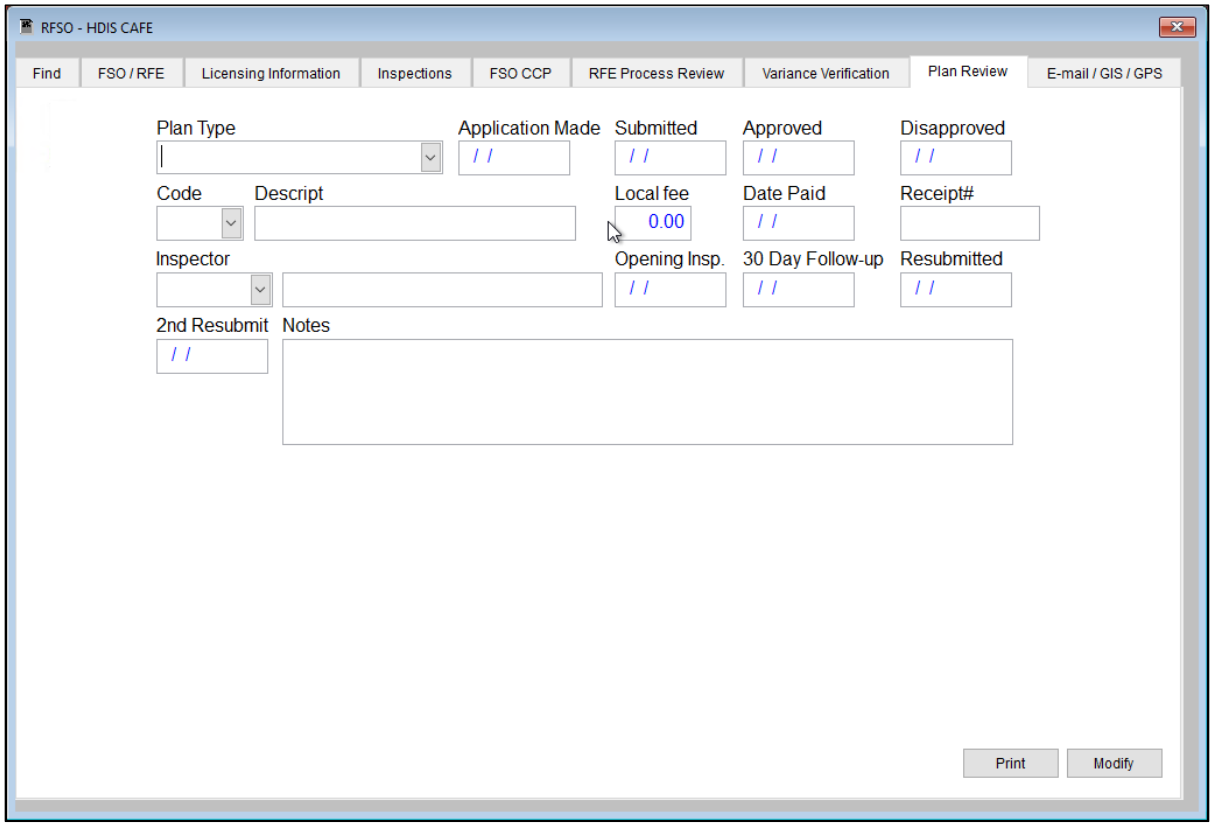
Comments

On this screen, you can enter your comments on the Variance Verification. Also, be sure to fill out the Inspector's name, number and who received the report.



Plan Review Tab

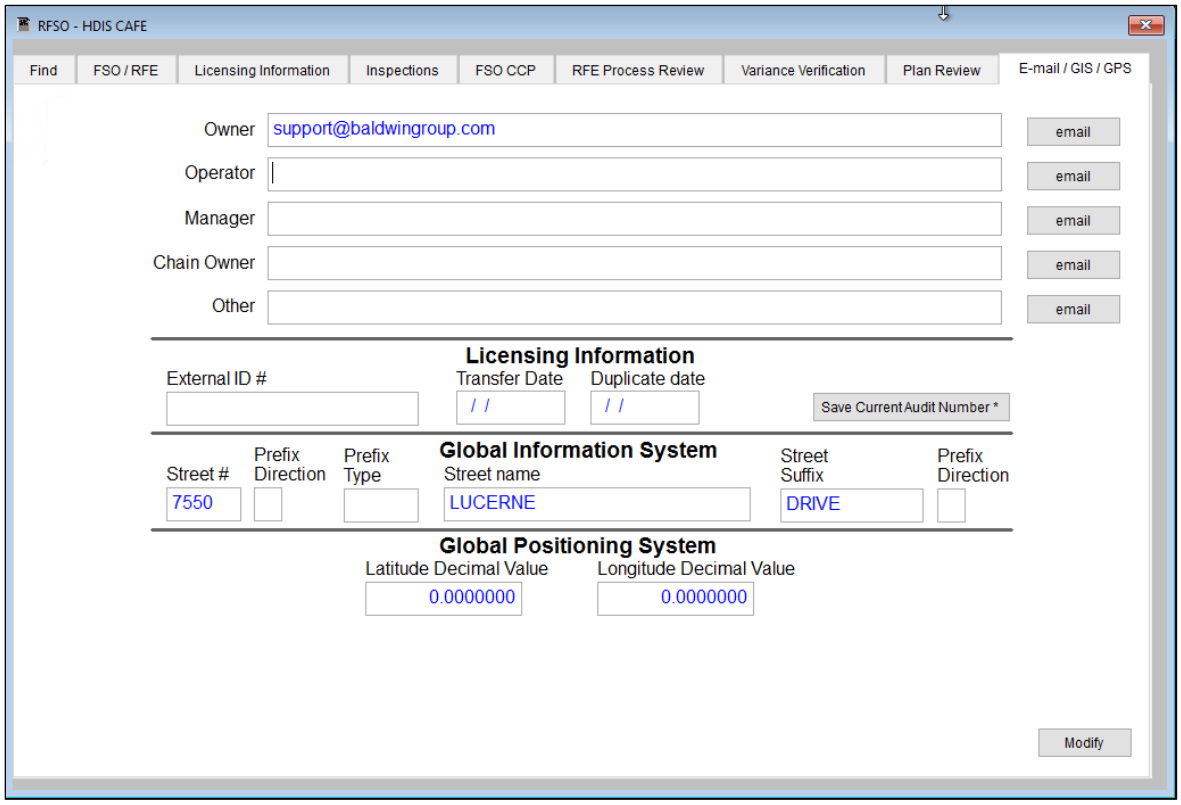
On this screen, you can enter your Plan Review for your FSO/RFE by clicking the Modify Button.



Field/Button	Description
Plan/Type	Choose the type of plan
Application Made	Enter the date that the application was made
Submitted	Enter the date that the application was submitted
Approved	Enter the date that the application was approved
Disapproved	Enter the date that the application was disapproved
Code	Choose the fee code
Descript	Automatically filled out
Local Fee	Automatically filled out
Date Paid	Enter the date that the application was paid for
Receipt #	Receipt # for the Plan Review, Press Ctrl + R for a receipt.
Inspector	Choose the inspector
Opening Insp.	Enter the date of the opening inspection
30 Day Follow-up	Enter the date of the 30 day follow-up
Resubmitted	Enter the date the review was resubmitted
2nd Resubmit	Enter the date the 2nd resubmission
Notes	Enter your notes on the plan review

Email / GIS / GPS Tab

The Email/GIS/GPS tab allows you to enter email contact information as well as your GPS coordinates for mapping purposes. Click the **Modify Button** to enter or modify your data.

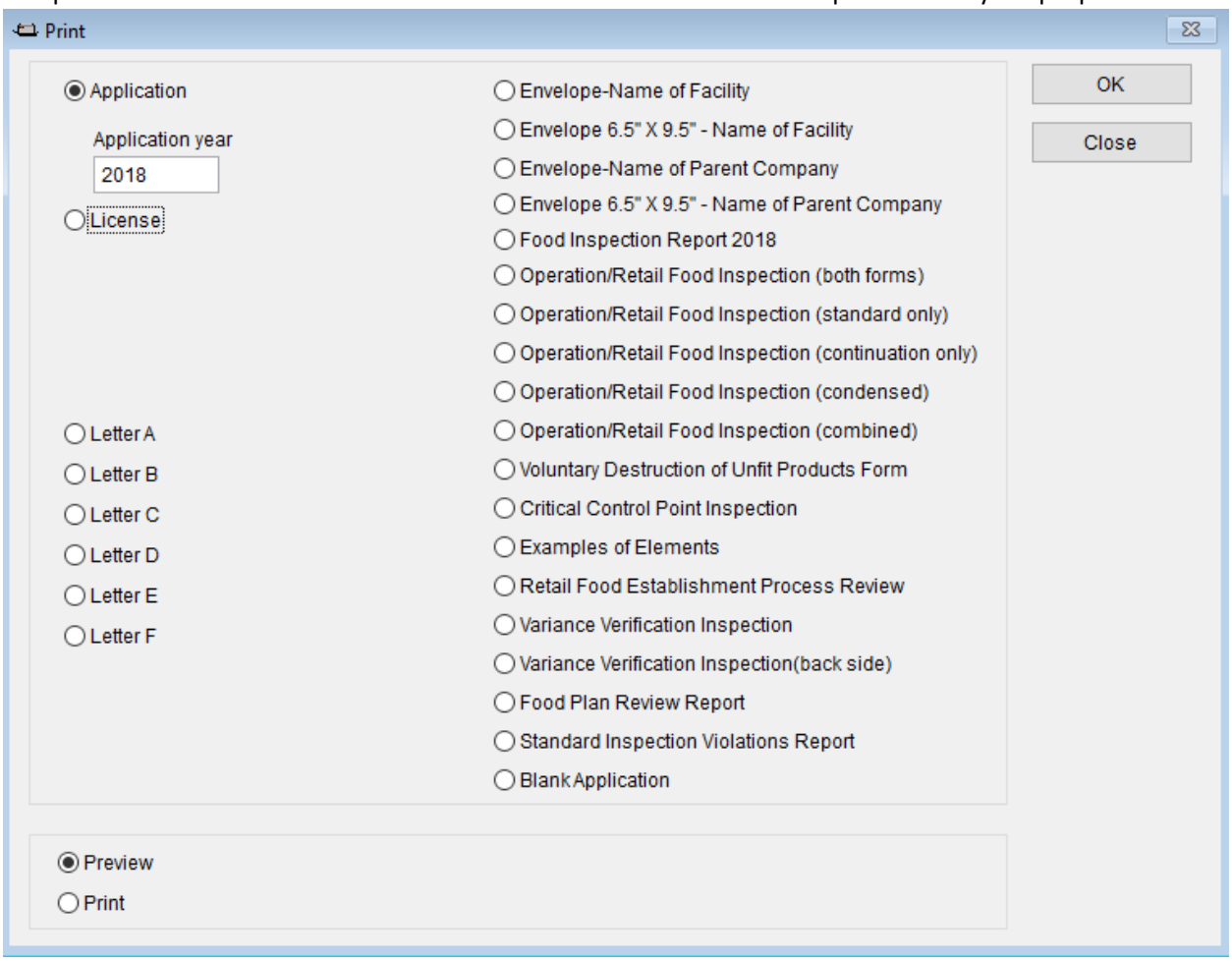


Field/Button	Description
Owner	Enter the email address of the business owner
Operator	Enter the email address of the business operator
Manager	Enter the email address of the manager
Chain Owner	Enter the email address of the chain owner
Other	Enter any other important email address
Licensing Information	
External ID #	
Transfer Date	
Duplicate Date	
Save Current Audit Number*	
Global Information System	

Street #	Automatically filled out when you enter the address on the first tab
Prefix Direction	Automatically filled out when you enter the address on the first tab
Prefix Type	Automatically filled out when you enter the address on the first tab
Street Name	Automatically filled out when you enter the address on the first tab
Street Suffix	Automatically filled out when you enter the address on the first tab
Prefix Direction	Automatically filled out when you enter the address on the first tab
Global Positioning System	
Latitude Decimal Value	Enter the latitude **DECIMAL** value of the location
Longitude Decimal Value	Enter the longitude **DECIMAL** value of the location

Print

The print button is available on all the tabs. ** Note: The licenses will print out on your preprinted license paper.**



Field/Button	Description
Application	Prints out an application form for this establishment
Application year	Specify the year you want the application printed for.
License	Prints out a license on the preprinted license paper. HDIS will automatically display the next available audit #. When you receive a new packet of licenses, enter the Audit # of the first license in the packet.
Letters A – F	Prints the letter chosen for this establishment.
Envelope – Name of Facility	Prints a business envelope addressed to the facility.
Envelope 6.5” x 9.5” – Name of Facility	Prints a 6.5” x 9.5” envelope addressed to the facility.
Envelope – Name of Parent Company	Prints an envelope addressed to the parent company.
Envelope 6.5” x 9.5” – Name of Parent Company	Prints a 6.5” x 9.5” envelope addressed to the parent company.
Operation/Retail Food Inspection (both forms)	Prints out the Food Service Standard Inspection Report along with the Continuation Report.
Operation/Retail Food Inspection (standard only)	Prints out the Food Service Standard Inspection Report.
Operation/Retail Food Inspection (continuation only)	Prints out the Food Service Continuation Report.

Operation/Retail Food Inspection (condensed)	
Operation/Retail Food Inspection (combined)	
Voluntary Destruction of Unfit Products Form	Prints out the Voluntary Destruction of Unfit Products Report.
Critical Control Point Inspection	Prints out the Critical Control Point Inspection Report.
Examples of Elements	Prints out the Examples of Elements form.
Retail Food Establishment Process Review	Prints out the Retail Food Establishment Process Review Report.
Variance Verification Inspection	
Variance Verification Inspection (back side)	
Food Plan Review Report	Prints out the Food Plan Review Report
Standard Inspection Violations Report	Prints a count report of all the Standard Inspection violations
Blank Application	
Preview	Selects the output to preview.
Print	Selects the output to the printer.
OK	Use to print or preview the form requested.
Close	Closes the print menu.
Update Record	After printing a license, this button will appear. Click to update the new Audit Number and also the date issued.
Void	After printing a license, this button will appear. If you discover you incorrectly printed the license, click the Void button, which will create a Void record that will account for the license audit number.

How to Void a License

There are two ways to void a license. The first way is described above when you are in the Print window and have just incorrectly printed a license. The second way is as follows:

Click the Window Tab **Find**

Click the **Add** button

Click the appropriate check box for type of license

Enter "**\ VOID"** in the name field (use a backslash and a space before the word "VOID").

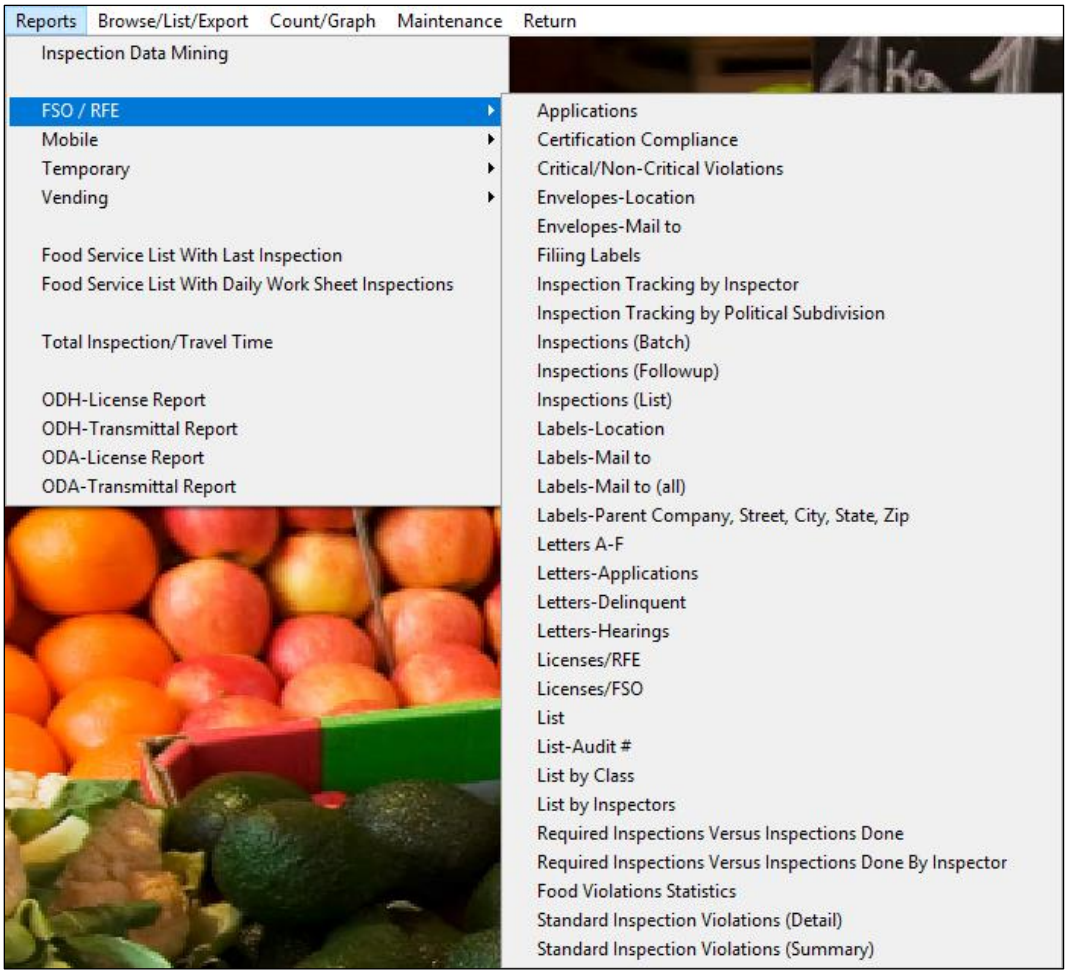
Click the "**Licensing Information"** window tab

Enter the fee code as "**VD"**

Enter the audit number you are voiding in the "**Audit"** field

Enter the date voided in the "**Date Issued"** field

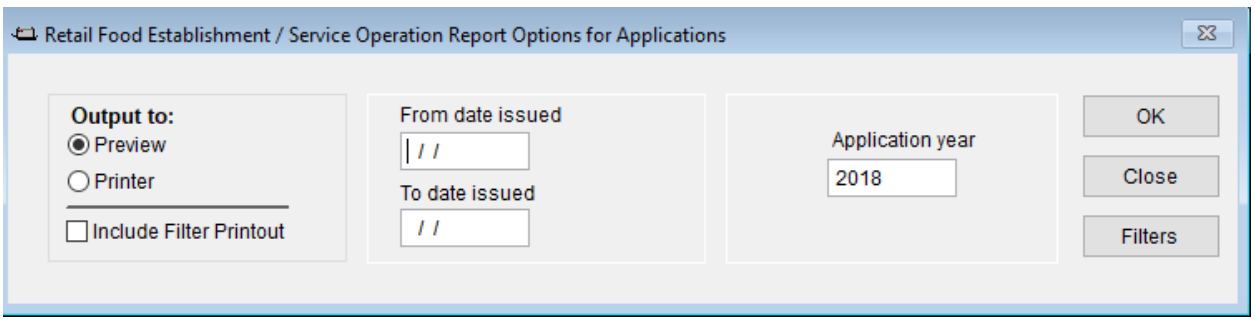
Chapter 3: Reports



The Food Protection program has a set of pre-defined reports to choose from.

Most reports will ask for **From date issued** and **To date issued.**

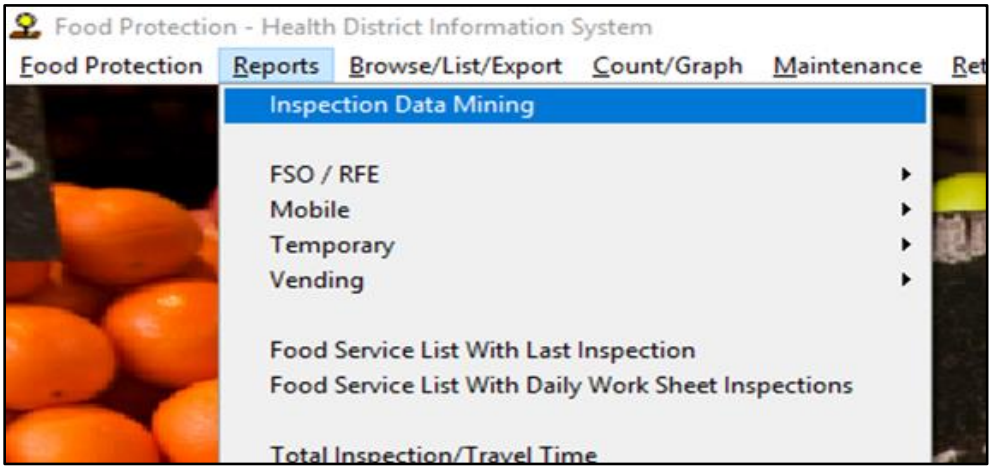
This is to prevent printing a report for a FSO/RFE that is Out of Business or that did not apply for a license.



Inspection Data Mining

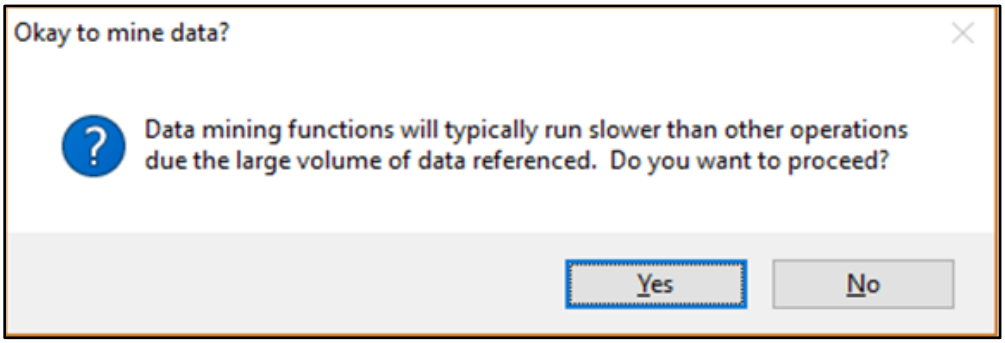
Food Inspection Data Mining provides for two different views of your data.

The first is a collection of establishments that have, or have not, had inspections that match the specified search criteria. The second view of your data is as a collection of violations found across any inspections.



Food Inspection Data Mining is available as the first option in the Report menu in the Food Protection module.

When you select the "Inspection Data Mining" option, the program will warn you that this is a data intensive operation not recommended for use on slower computers or slower network connections.



Data mining operations will always be at least a little slower than other operations due to the volume of data involved.

The Data Mining screen provides you with an overview of all establishments of all types.

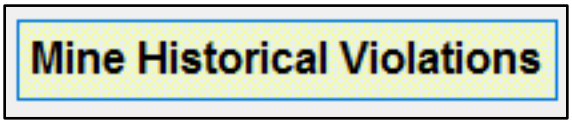
Particularly important attributes include the dates to search, the entity types to review, and whether or not there were inspections that match the search criteria for any matching establishments.

Within the Food Safety Data Mining screen, it is possible to filter on many different aspects of your data.

There are many columns in the list and you may need to scroll to the right in order to see all the columns based on your screen size and whether you have maximized the window.

Click the Maximize button to expand the window to the maximum available size. Extra space will be given to the table showing the list of selected inspections.

Mine Historical Violations



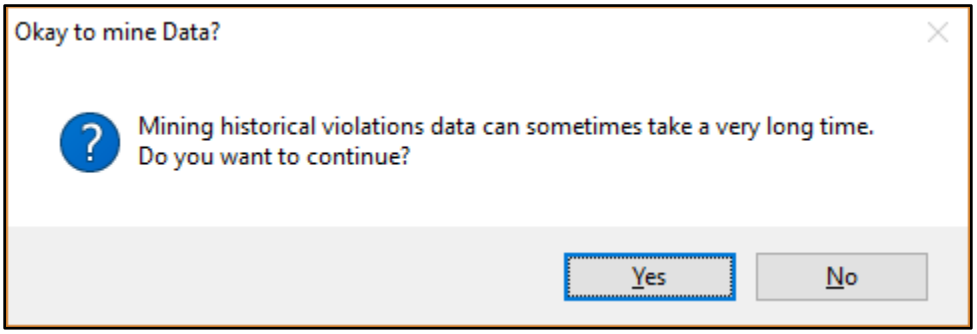
When you mine historical violations, the process goes through the comments of the inspections to gather data about what codes (down to the paragraph level) are being violated.

This part of the process is not necessary to do every single time you use the data mining screen; however, it should be done on a regular basis.

Depending upon the amount of data that is entered into your system, this could mean using the utility on a weekly or monthly basis.

Additionally, this process should be ran the first time you intend to use the data mining as a resource for reporting.

Once the Mine Historical Violations button is clicked, a confirmation message will be displayed.

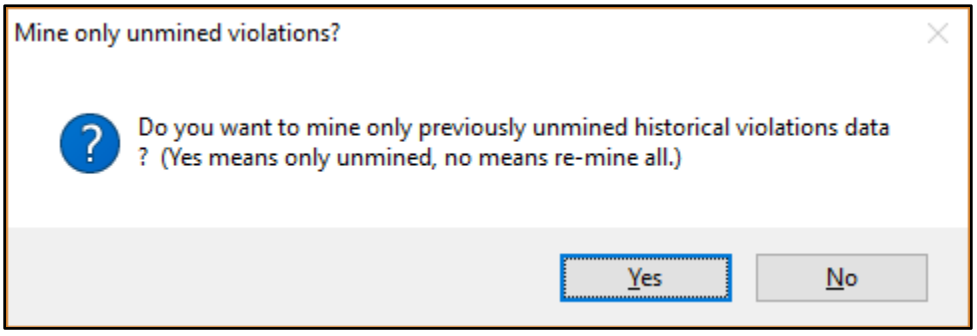


The program will read through inspection comments and try to identify specific code violations. This can take a very long time, but only needs to be done once for a given inspection record.

After you click on the "Mine Historical Violations" button, the system will let you either refresh the mining results completely, or merely mine those records that have not yet been mined.

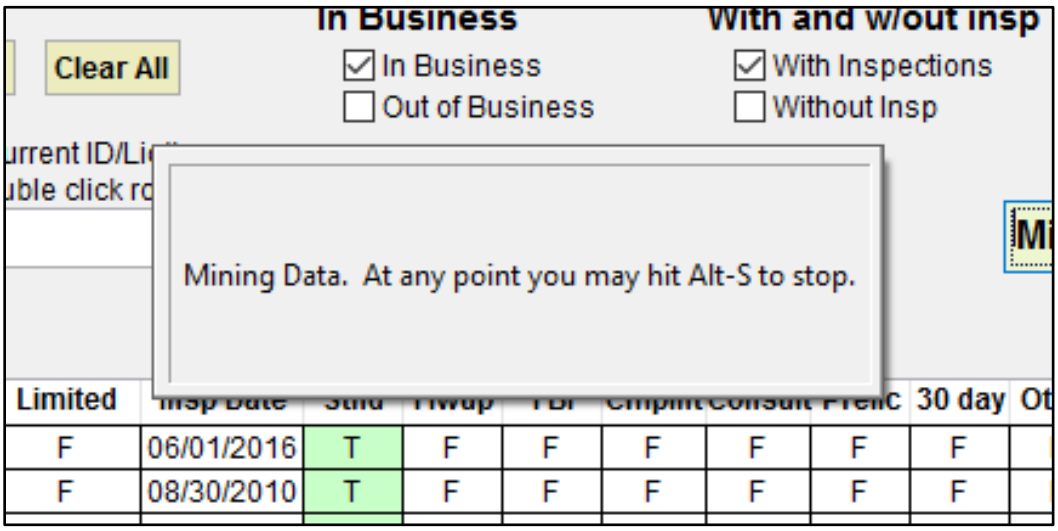
The system will try to save time by picking up where it left off if you click on "Yes".

Individual inspection records don't need be mined again if they remain unchanged.

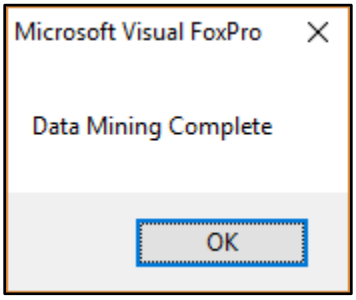


Sometimes the mining of historical inspections for violations will take a very long time, especially if you have many inspections recorded in the program.

You may hit Alt-S to stop and start where you left off at a later time.



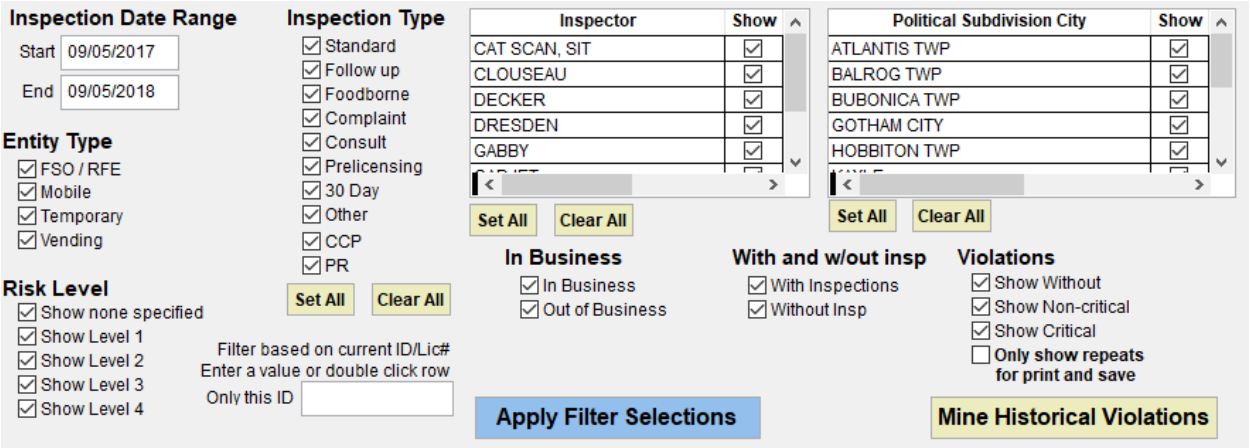
The program will let you know when the data mining has completed.



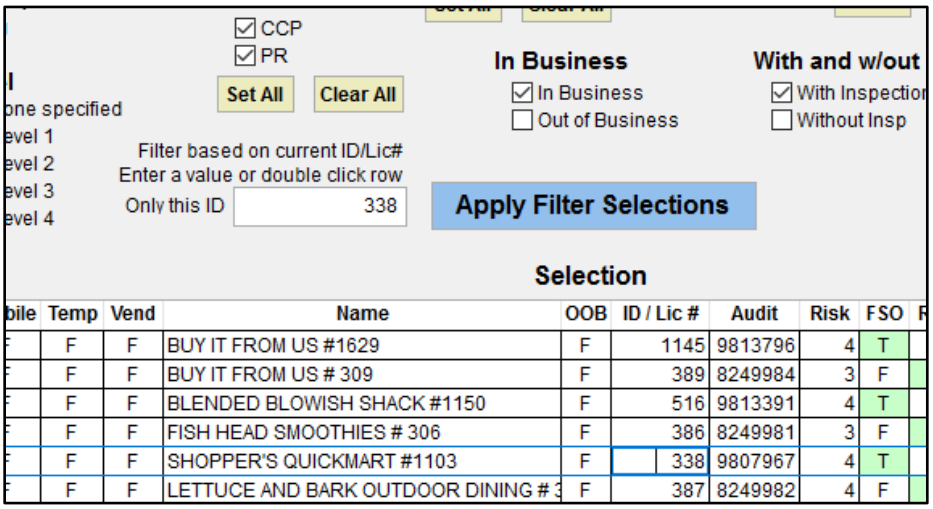
Data Mining Filters

Check or uncheck boxes, specify a current ID#, or modify dates as desired to alter the list of inspections shown. After you have changed your search criteria, click the button labelled "Apply Filter Selections".

"**Violations – Only show repeats for print and save**" Will display <u>only</u> repeat records.



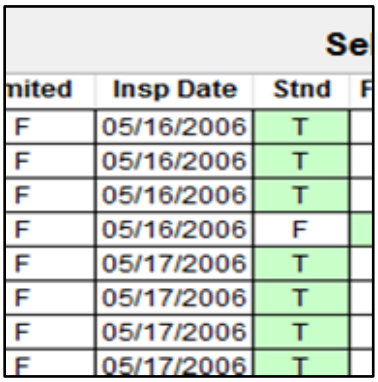
The search is narrowed or expanded as you see fit. Any time you want your selections to be applied, click on the **Apply Filter Selections** button.



bile	Temp	Vend	Name	OOB	ID / Lic #	Audit	Risk	FSO	R
	F	F	BUY IT FROM US #1629	F	1145	9813796	4	T	
	F	F	BUY IT FROM US # 309	F	389	8249984	3	F	
	F	F	BLENDED BLOWISH SHACK #1150	F	516	9813391	4	T	
	F	F	FISH HEAD SMOOTHIES # 306	F	386	8249981	3	F	
	F	F	SHOPPER'S QUICKMART #1103	F	338	9807967	4	T	
	F	F	LETTUCE AND BARK OUTDOOR DINING # 3	F	387	8249982	4	F	

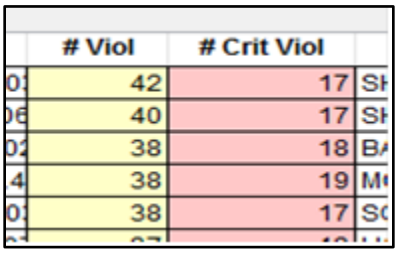
If you wish to view only one establishment, either enter the current ID number or double click on any row that relates to that establishment. To view all establishments again either clear the ID amount field or enter a value of zero. Any time you want your changes to be applied, click on "Apply Filter Selections" to refresh the list of inspections.

Click on any column heading to sort. On the first click the column will sort in ascending order. On the second click it will sort in descending order.



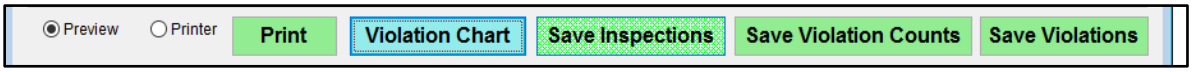
			Se
nited	Insp Date	Stnd	F
F	05/16/2006	T	
F	05/16/2006	T	
F	05/16/2006	T	
F	05/16/2006	F	
F	05/17/2006	T	
F	05/17/2006	T	
F	05/17/2006	T	
F	05/17/2006	T	

Viewing in descending order may be useful when reviewing violation data.



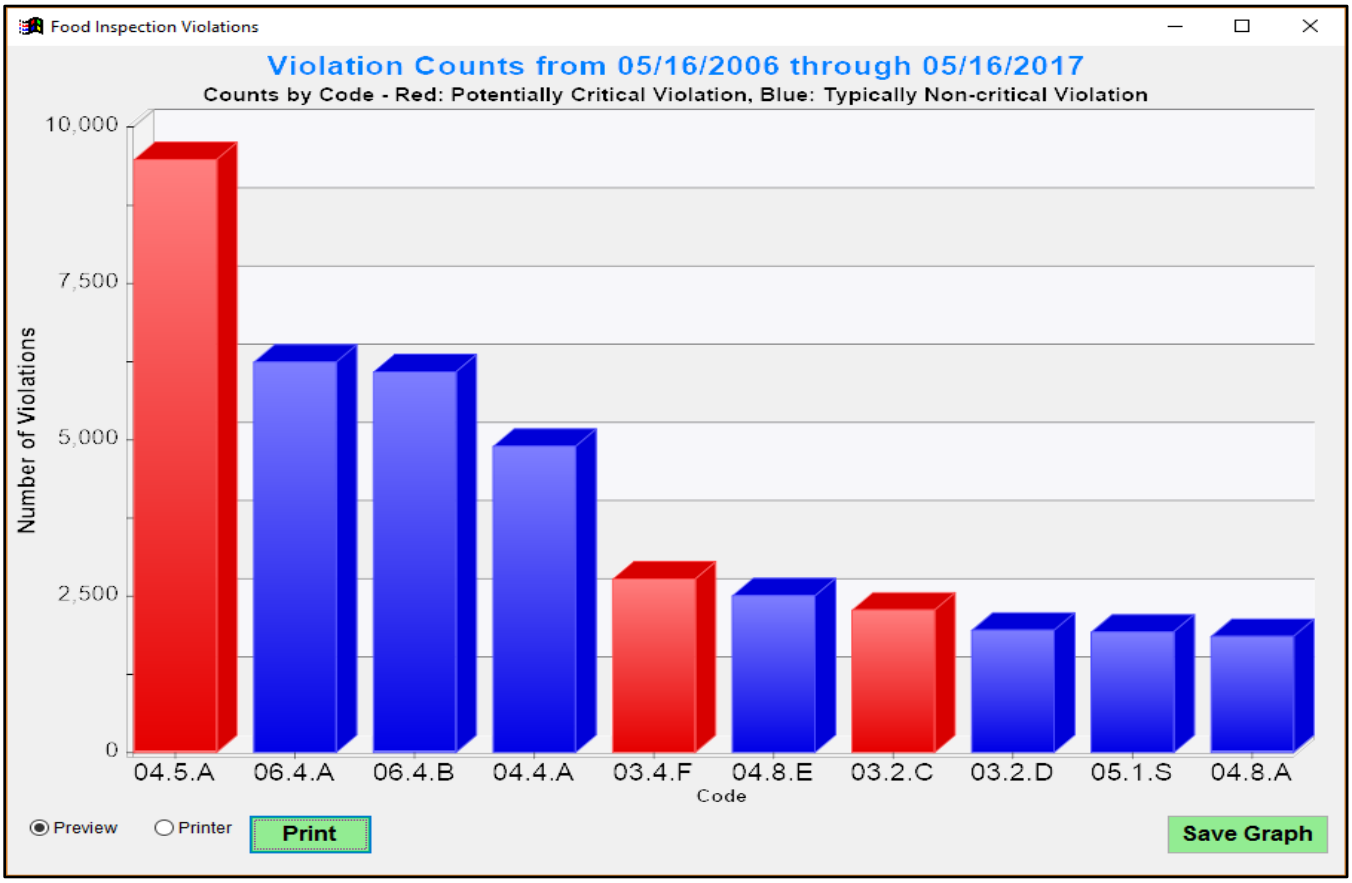
	# Viol	# Crit Viol	
01	42	17	SH
06	40	17	SH
02	38	18	BA
4	38	19	MC
01	38	17	SC

There are several options for saving or printing the selected information.



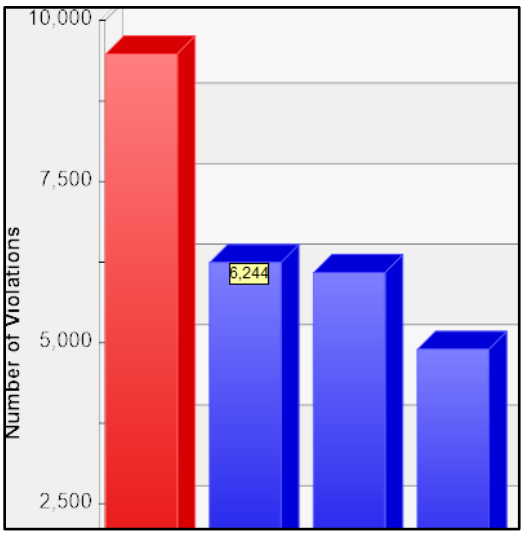
Print Button: Will produce a report listing the ID #, Name, Inspection Date, Inspector and Inspection Type of the information listed in the grid. Due to the large number of columns, the printed report does not include all the information shown on the screen. Also choose whether to preview or send the report directly to the printer.

Violation Chart: Using the Violation Chart button, you may bring up a chart of counts of violations by type that were found during the inspections shown. Up to ten categories are shown, sorted in descending order by count within each code category.

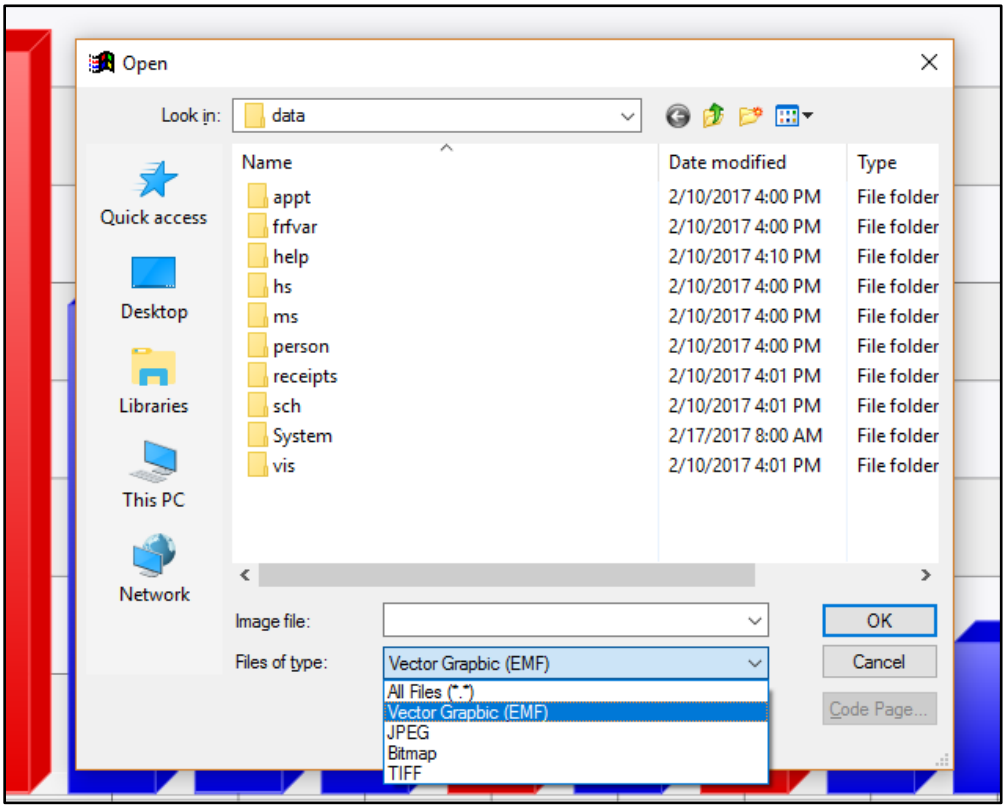


The chart shows the top ten violation categories for the selected inspections sorted from greatest count to least.

Additionally, you can hover over a column to get the exact count



Using the **Save Graph** button will Save the chart as shown to an EMF, JPEG, BMP, or TIFF file. EMF is a vector format that allows the image to be greatly magnified. You may stretch the height and width of the chart window prior to saving, so as to emphasize or de-emphasize the differences in column height.



Save Inspections: To save the full information shown, you may click on the "Save Inspections" button to save the displayed grid to a spreadsheet.

Save Violation Counts: Creates a spreadsheet with a listing of violation counts by category found during the selected inspections. One code is shown per row in the spreadsheet, with the most frequently cited showing first.

Save Violations: Creates a spreadsheet with a full listing of violations found during the selected inspections. One violation is shown per row in the spreadsheet.

Reports – FSO/RFE

Applications: This will generate applications for EACH FSO/RFE. You must enter the **From date issued**, **To date issued** and **Application Year**.

Certification Compliance:

Critical/Non-Critical Violations: Generates the Critical/Non-Critical Violations Report that meets the criteria set in the **From Inspection Date** and **To Inspection Date**.

Envelopes-Location: Addresses envelope to the location of EACH FSO/RFE based on the **From Inspection Date** and **To Inspection Date**.

Envelopes-Mail To: Addresses envelope to the "mail to" field of the FSO/RFE based on the **From Inspection Date** and **To Inspection Date**.

Filing Labels: Prints out filing labels for your FSO/RFE's. Also gives you the ability to skip labels to print on partial sheets.

Inspection Tracking by Inspector: Produces a report listing all inspections needed and completed by Class, by inspector.

Inspection Tracking by Political Subdivision: Produces single page reports by inspector broken down by political subdivision listing all inspections needed and completed by Class.

Inspections (Batch): Produces the complete standard inspection for each FRO/RFE, based on the **From Inspection Date** and **To Inspection Date**.

Inspections (Followup): Produces a list of follow-up inspections required, based on the **From Follow-up Inspection Date** and **To Follow-up Inspection Date** (typically a future date range). Also can specify a certain inspector or leave blank for all.

Inspections (List): A report listing the fee code, ID #, Name, last two standard inspections, last two CCP inspections, inspector number, if it is a seasonal along with the address of the establishment.

Labels-Parent Company, Street, City, State, Zip: Prints out label0101s for the parent company of the establishment, based on the **From Inspection Date** and **To Inspection Date**. Allows for three choices of labels.

Letters A-F: Allows for the batch printing of letters for each FSO/RFE, based on the **From Inspection Date** and **To Inspection Date** as well as which letter is to be printed.

Letters-Applications: Generates the letter designated as the "Application" letter in Maintenance > Letters > RFE/FSO, for each FSO/RFE, based on the **From Inspection Date** and **To Inspection Date.**

Letters-Delinquent: Generates the letter designated as the "Delinquent" letter in Maintenance > Letters > RFE/FSO, for each FSO/RFE, based on the **From Inspection Date** and **To Inspection Date.** After printing these letters, you will be asked to update the late fee.

Letters-Hearings: Generates the letter designated as the "Office Hearing" letter in Maintenance > Letters > RFE/FSO, for each FSO/RFE, based on the **From Inspection Date** and **To Inspection Date.**

Licenses/RFE:
***** To use this feature the "Allow User to Print Batch Licenses" checkbox must be marked in the General Profile > Environmental Tab > Food Protection Tab"*****
This will generate licenses for each RFE that meets the criteria set in the "**From Date Issued**" and "**To Date Issued**" fields. Change the "**Next Available Audit#**" and "**Licensing Year**", if necessary. Click **OK** to generate licenses. After the licenses are printed, a window will appear asking you to update those records with their new Audit # and date issued. Click **OK** to update the records.

Licenses/FSO:
***** To use this feature the "Allow User to Print Batch Licenses" checkbox must be marked in the General Profile > Environmental Tab > Food Protection Tab"*****
This will generate licenses for each FSO that meets the criteria set in the "**From Date Issued**" and "**To Date Issued**" fields. Change the "**Next Available Audit#**" and "**Licensing Year**", if necessary. Click **OK** to generate licenses. After the licenses are printed, a window will appear asking you to update those records with their new Audit # and date issued. Click **OK** to update the records.

List: Generates a list of FSO/RFE's, based on the **From Inspection Date** and **To Inspection Date.** Lists the ID, Name, Phone, Address, FSO/RFE designation, political subdivision, fee code, fee description and total fee.

List-Audit #: Generates a list of FSO/RFE's by audit #, based on the **From Inspection Date** and **To Inspection Date.** Lists the ID, Name, Date Issued, Audit #, Fee Code, License Fee, Late Fee and State Fee.

List by Class: Generates a list of FSO/RFE's by class, based on the **From Inspection Date** and **To Inspection Date.** Lists the ID, Political Subdivision, Name, Operator's Name/Phone #, Address/City, Class & Type, Last Three Inspections and Last CCP or PR Inspection Date.

List by Inspectors: Generates a list of FSO/RFE's grouped by inspectors, based on the **From Inspection Date** and **To Inspection Date.** Lists ID, Date Issued, Political Subdivision, Name, Operator's Name/Phone #, Address/City, Class & Type, Last Three Inspections and Last CCP or PR Inspection Date.

Required Inspections Versus Inspections Done: Generates a report of required inspections versus inspections done, based on the **From Inspection Date** and **To Inspection Date.**

Required Inspections Versus Inspections Done by Inspector: Generates a report of required inspections versus inspections done by inspector, based on the **From Inspection Date** and **To Inspection Date.**

Food Violation Statistics: Report showing both critical and non critical violations, based on the **From Inspection Date** and **To Inspection Date.** Lists Name, Street, # of Violations, # of Critical Violations and specific violations.

Standard Inspection Violations (Detail): Report showing both critical and non critical violations, based on the **From Inspection Date** and **To Inspection Date.** Lists Name, Street, # of Violations, # of Critical Violations and specific violations.

Standard Inspection Violations (Summary): Report showing # of counts by category, based on the **From Inspection Date** and **To Inspection Date.**

Electronic Signatures for Food Service Licenses

Create a bit map file (.bmp) from your Health Commissioner's signature.

For best results, make the size of the bit map 1/2 inches high and 4 inches long.

Save this file in **C:\HDIS\GRAPHICS**. DO NOT MAKE THE NAME LONGER THAN 8 CHARACTERS plus the extension (Example: BALDWIN.BMP)

In HDIS, open the **Profile** window under **MAINTENANCE** of the main menu.

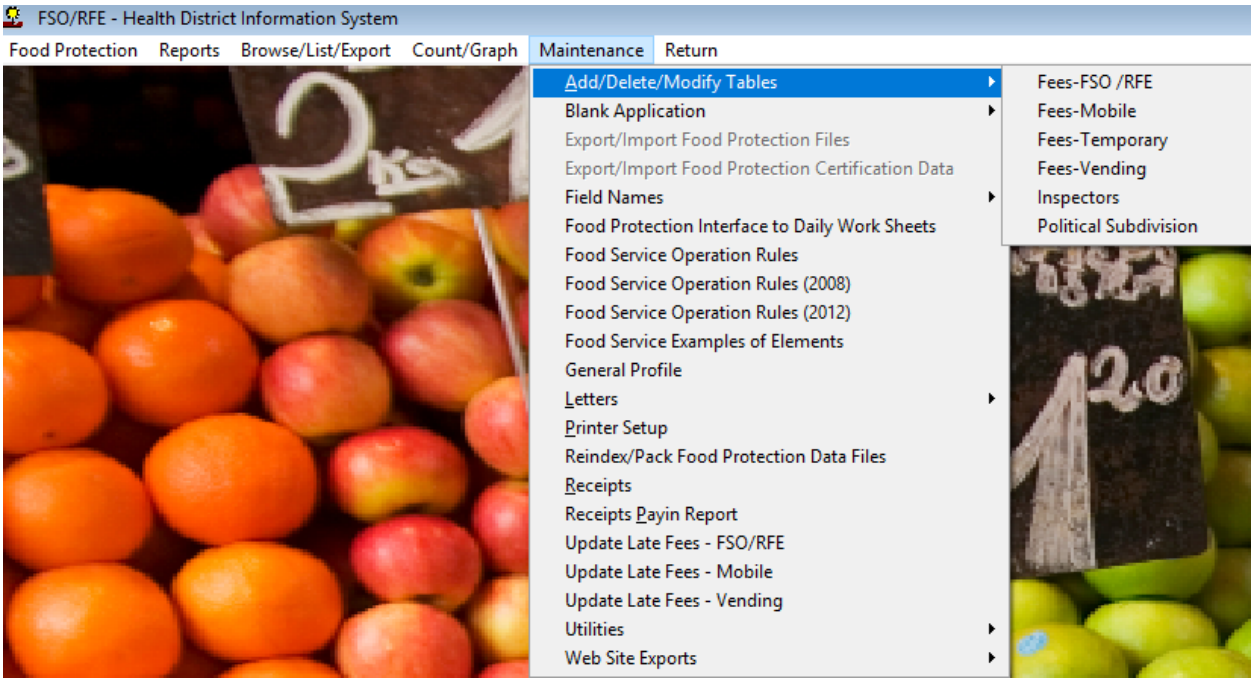
Click the **MANAGEMENT** tab and enter the name of the signature file in that field. Proceed to print a license on a blank sheet of paper as a test.

When complete, copy the file to your server in the **H:\HDIS\GRAPHICS** directory (assuming your data is on the H: disk drive. Then have everyone do an UPGRADE to download that file to their C: drive.

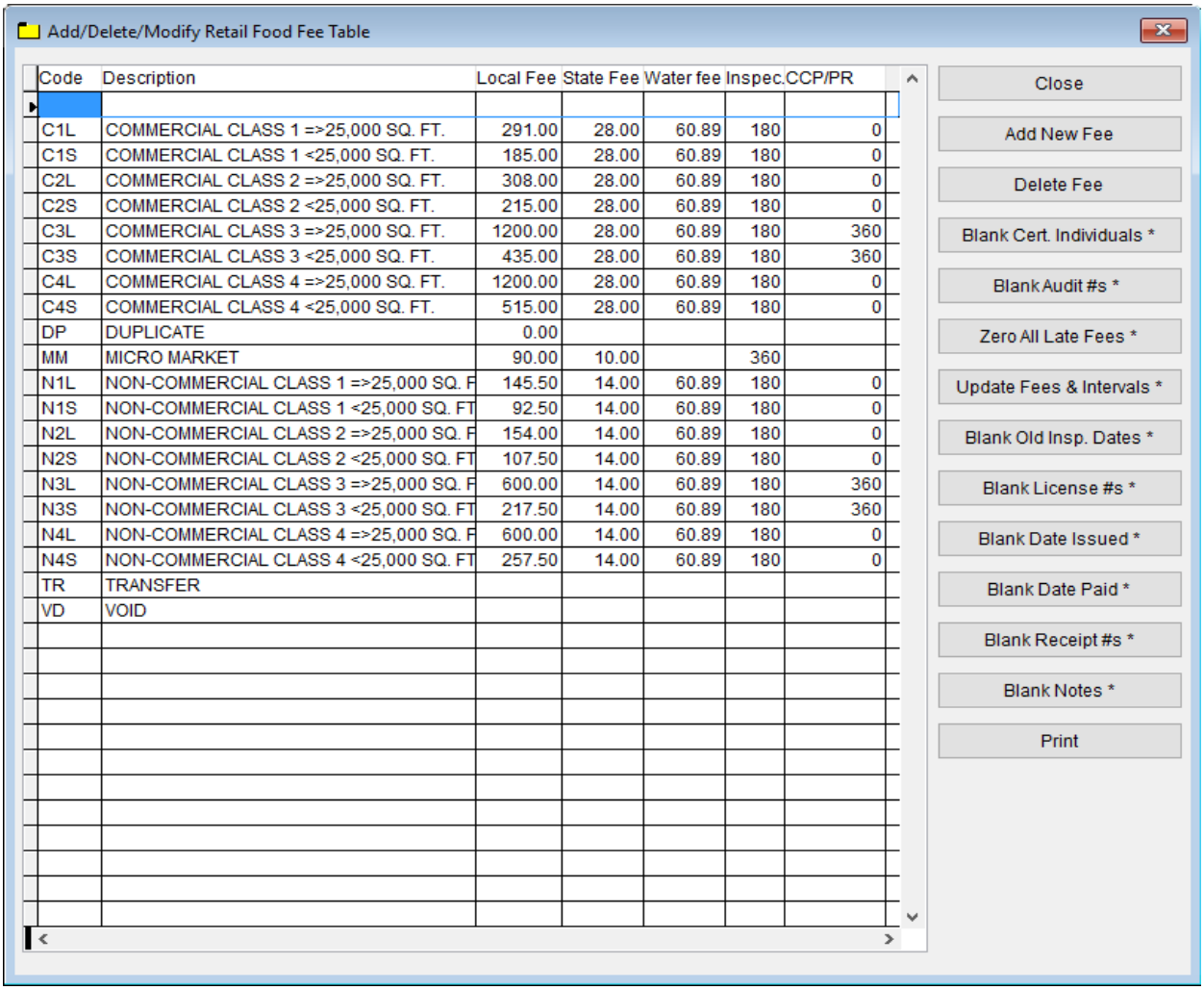
Chapter 4: Maintenance

This section covers areas that help drive the Food Protection module.

Making sure that things are properly entered here is a necessity for a smooth program experience.



Fees – FSO/RFE



Code	Description	Local Fee	State Fee	Water fee	Inspec.	CCP/PR
C1L	COMMERCIAL CLASS 1 =>25,000 SQ. FT.	291.00	28.00	60.89	180	0
C1S	COMMERCIAL CLASS 1 <25,000 SQ. FT.	185.00	28.00	60.89	180	0
C2L	COMMERCIAL CLASS 2 =>25,000 SQ. FT.	308.00	28.00	60.89	180	0
C2S	COMMERCIAL CLASS 2 <25,000 SQ. FT.	215.00	28.00	60.89	180	0
C3L	COMMERCIAL CLASS 3 =>25,000 SQ. FT.	1200.00	28.00	60.89	180	360
C3S	COMMERCIAL CLASS 3 <25,000 SQ. FT.	435.00	28.00	60.89	180	360
C4L	COMMERCIAL CLASS 4 =>25,000 SQ. FT.	1200.00	28.00	60.89	180	0
C4S	COMMERCIAL CLASS 4 <25,000 SQ. FT.	515.00	28.00	60.89	180	0
DP	DUPLICATE	0.00				
MM	MICRO MARKET	90.00	10.00		360	
N1L	NON-COMMERCIAL CLASS 1 =>25,000 SQ. F	145.50	14.00	60.89	180	0
N1S	NON-COMMERCIAL CLASS 1 <25,000 SQ. FT	92.50	14.00	60.89	180	0
N2L	NON-COMMERCIAL CLASS 2 =>25,000 SQ. F	154.00	14.00	60.89	180	0
N2S	NON-COMMERCIAL CLASS 2 <25,000 SQ. FT	107.50	14.00	60.89	180	0
N3L	NON-COMMERCIAL CLASS 3 =>25,000 SQ. F	600.00	14.00	60.89	180	360
N3S	NON-COMMERCIAL CLASS 3 <25,000 SQ. FT	217.50	14.00	60.89	180	360
N4L	NON-COMMERCIAL CLASS 4 =>25,000 SQ. F	600.00	14.00	60.89	180	0
N4S	NON-COMMERCIAL CLASS 4 <25,000 SQ. FT	257.50	14.00	60.89	180	0
TR	TRANSFER					
VD	VOID					

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
State Fee	Enter state fee
Inspection	Enter the inspection interval
Close	Closes the table
Add New Fee	Adds a new fee to the table
Delete Fee	Deletes the highlighted fee
Blank Cert. Individuals*	Clears out Cert Name and Cert Number fields on FSO/RFE tab of FSO/RFE screen
Blank Range of Audit # *	
Zero All Late Fees	Click this button before printing applications for the coming year. It will zero any late fees from the previous year.
Update New Fees	Updates all FSO/RFE's based on the fees in the fee table
Print	Prints a list of fee codes

Inspectors

Field/Button	Description
Code	Enter a code for the inspector
Name	Enter the name of the inspector
District	Enter the inspector's district(optional)
Close Button	Closes the table
Adds Button	Adds a inspector to the table.
Delete Button	Deletes a highlighted entry
Print Button	Prints the list
Update Inspectors	Use this to assign inspectors by political subdivision.

Political Subdivision

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

Export/Import Food Protection Clients

The **Export/Import** function allows you to take your Food Protection data out of the office on your laptop. If you would like to use a laptop for your inspections, please contact The Baldwin Group for the Remote Laptop software.

GUIDELINES:

Before you leave the office:

Import Food Service Files

Click "**Environmental Health"**

Click "**Food Protection"**

Click "**Maintenance"**

Click "**Lap Top - Export/Import Food Protection Files**"

Click "**Import Food Protection Clients From Server**" radio button

Click "**OK"**

Click "**Continue"**

Upon returning to the office:

Export Food Protection Files

Click "**Environmental Health"**

Click "**Food Protection"**

Click "**Maintenance"**

Click "**Lap Top - Export/Import Food Protection Files"**

Click "**Export Food Protection Clients to Server"** radio button

Note: Any record that has been modified will display a check in the box next to the name. Any Mobile or Temporary Food Service added will be displayed.

Click "**OK"**

Click "**Continue"**

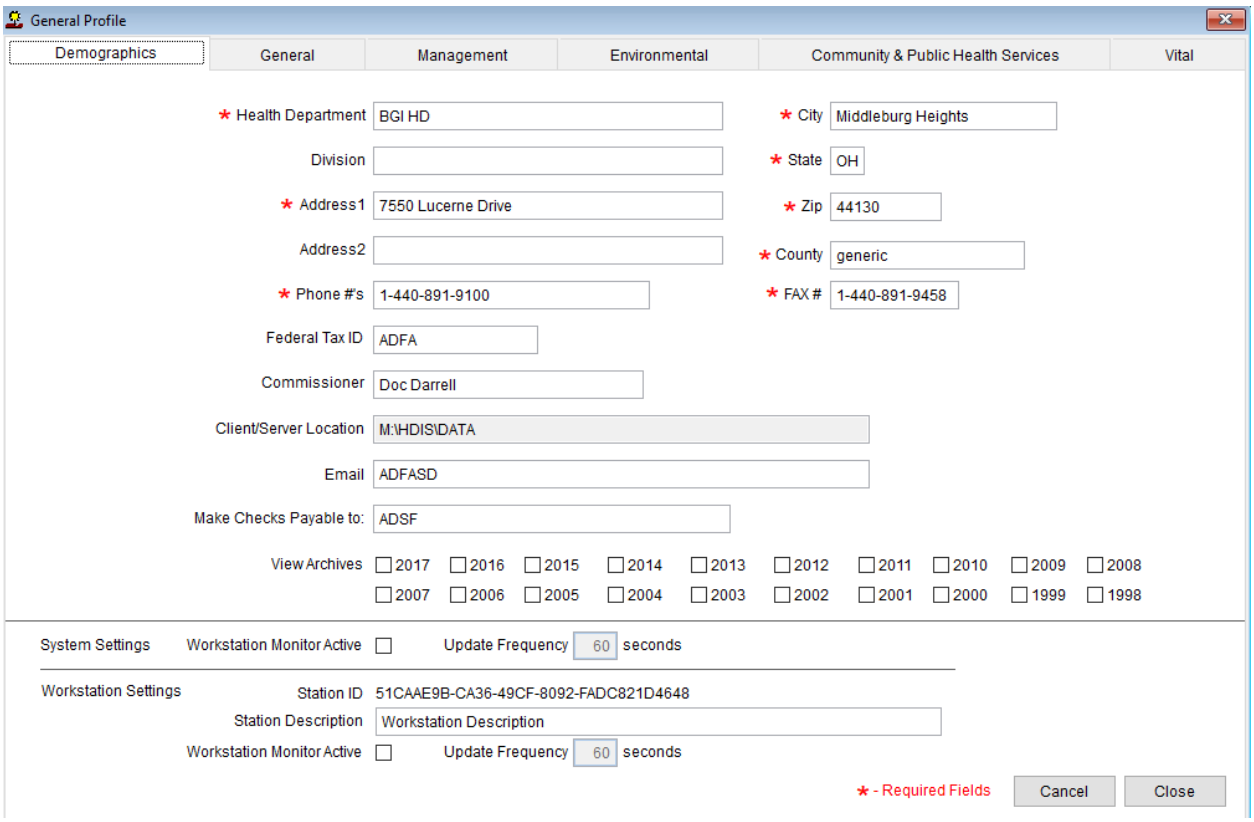
Field Names – RFEO/RFSO

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).

Food Service Operation Rules

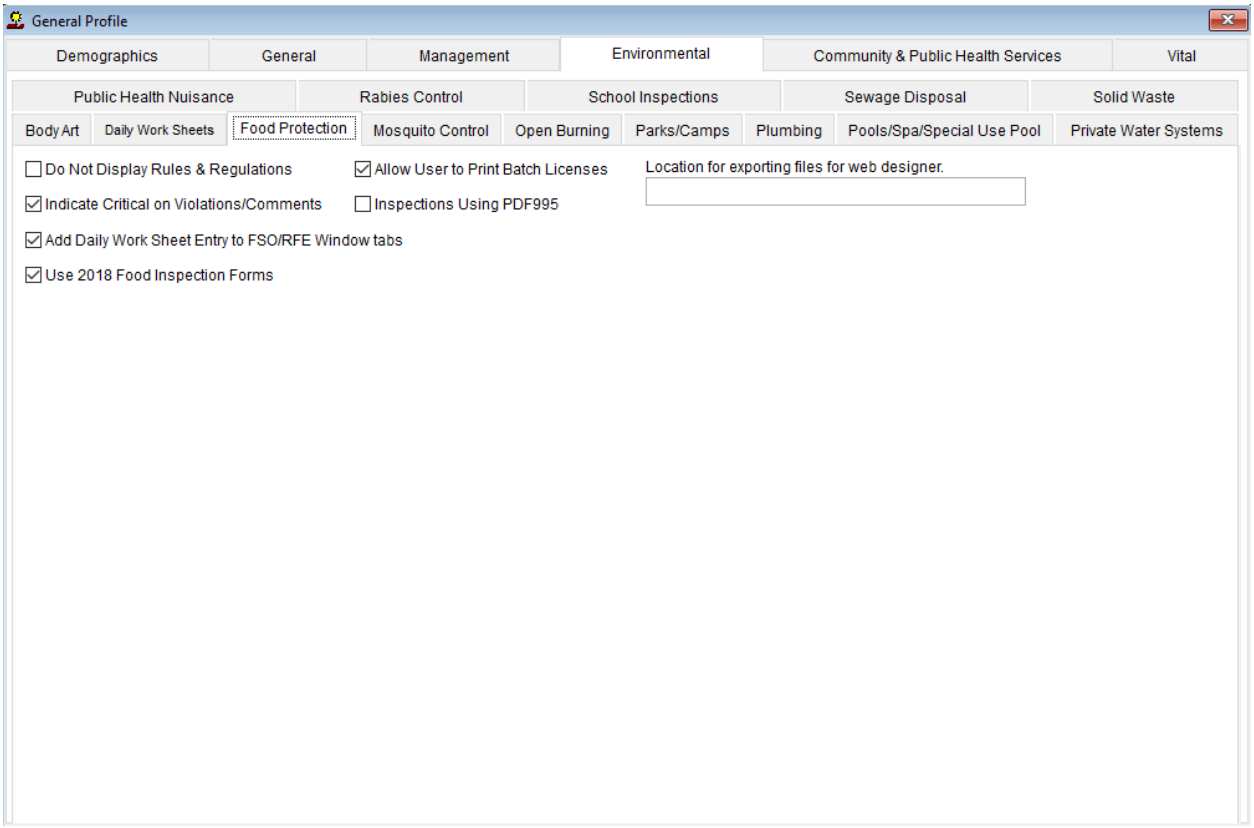
Field/Button	Description
#	ODH rule number
Title	ODH Rule Name
Code	ODH Rule Paragraph
Rules	Double click to view rule
Close	Closes the table
Add Button	Adds a operation rule to the table
Delete* Button	Right-click to delete a highlighted entry
Print	Prints the list

General Profile



The **General Profile** allows you to fill out the basic information regarding your health department.

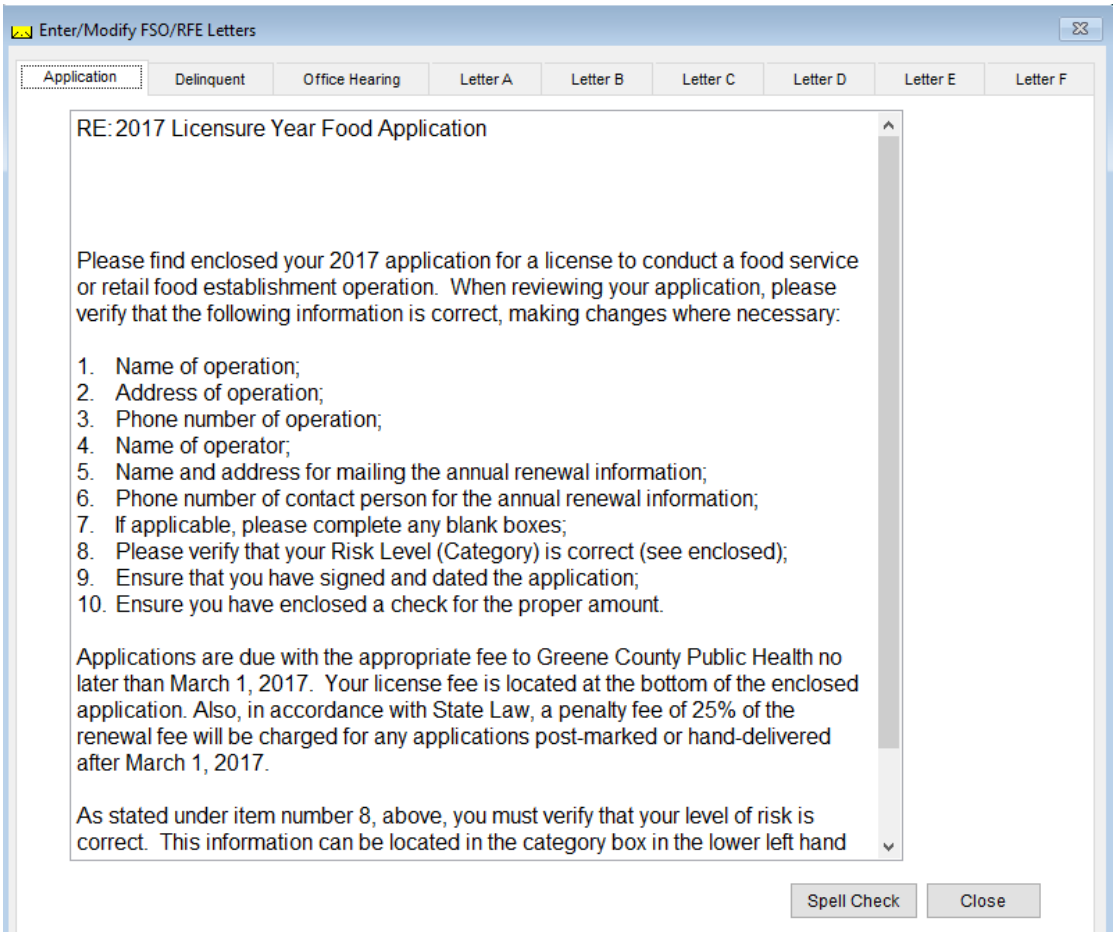
Food Protection



Note: **Make sure Use 2018 Food Inspection Forms is check marked**

Check Box	Description
Do Not Display Rules & Regulations	Click to disable the "Rules and Regulations" window from opening when a violation is clicked.
Indicate Critical on Violations/Comments	Click to indicate which violations where critical in the "Violations/Comments" field.
Add Daily Work Sheet Entry to FSO/RFE Window Tabs	Click to provide access to the Daily Worksheet Module from the Food Protection Module.
Allow User to Print Batch Licenses	Click to allow printing of batch licenses.
Inspections Using PDF995	Uses the PDF995 "printer" to
Location for Exporting Files for Web Designer	Enter the location where the food inspection files are to be saved that will be put on your website.

Letters – RFEO/RFSO



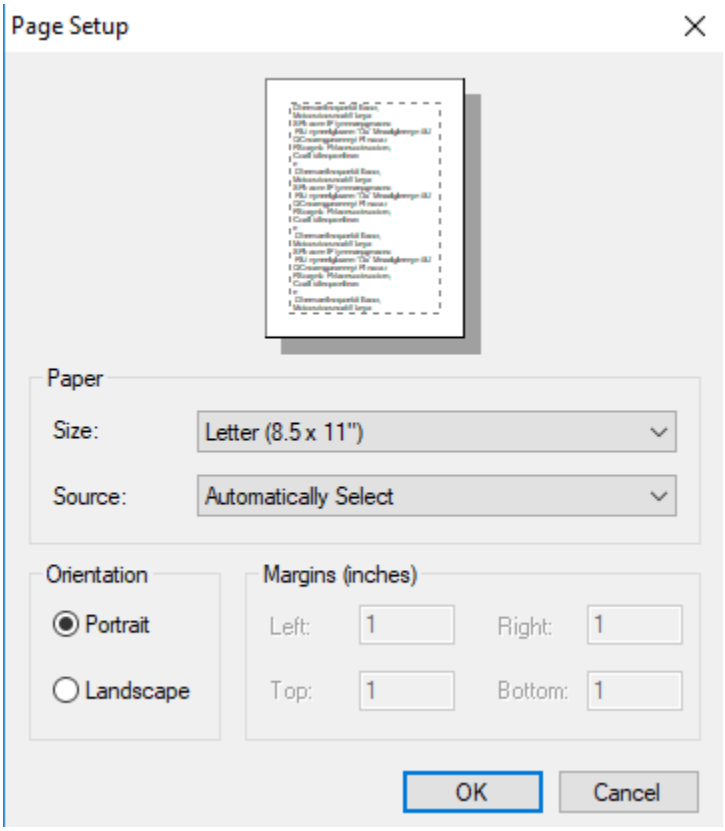
The HDIS system provides you the flexibility to write standard letters that can be sent to clients. These letters will pull data through use of the *.

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.

The program allows for your Application, Delinquent, and Office Hearing letters along with six of your own letters.

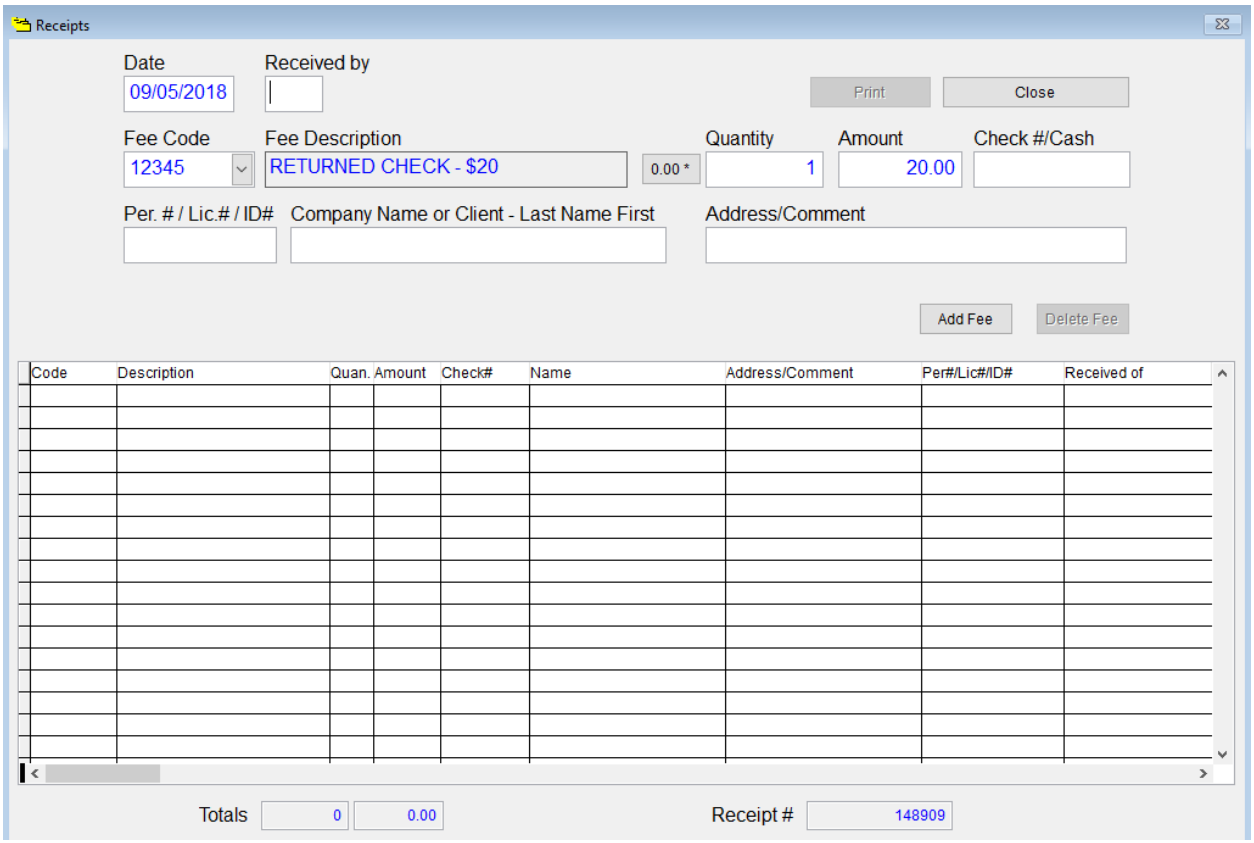
Example: *OWNER* = TOM GORDON

Printer Setup



The print setup allows you to choose from what printer you would like to print. Pick the printer in the name dropdown and click "**OK**".

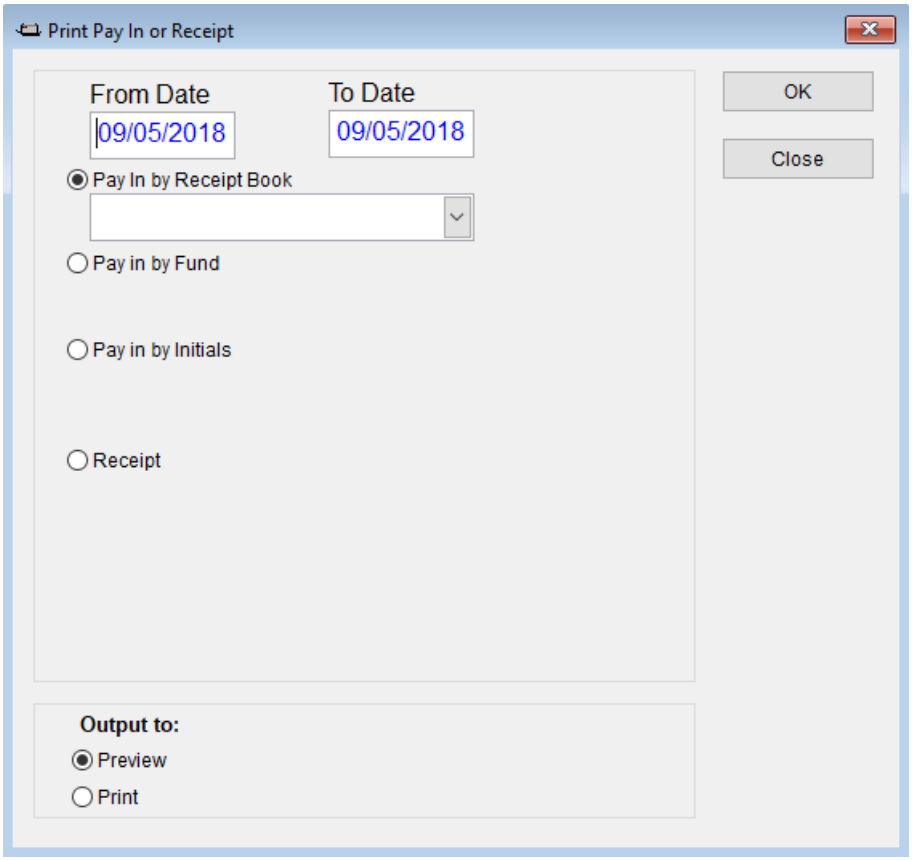
Receipts



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 FSO/RFE data entry windows by pressing **ALT-R** keys.

Receipts Pay-In Report



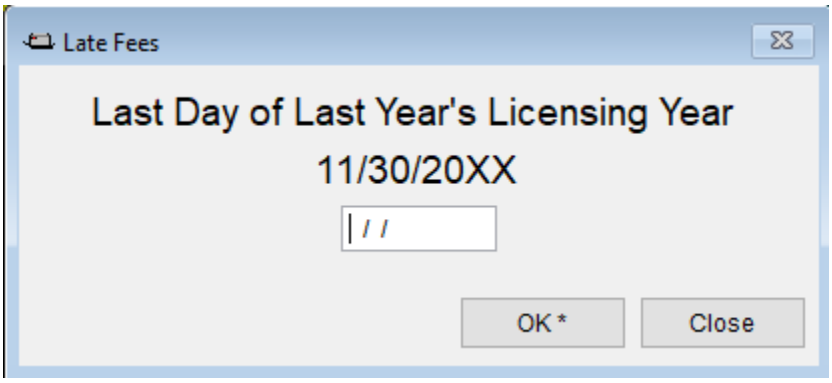
If your health department has the **Receipts** module, you have the ability to print your pay in reports through the **Maintenance** tab.

There is a drop down menu for each selection:

Pay in by Receipt Book, **Pay in by Fund**, **Pay in by Initials**, and **Receipt**.

Either choose or fill in the necessary options available for your receipt.

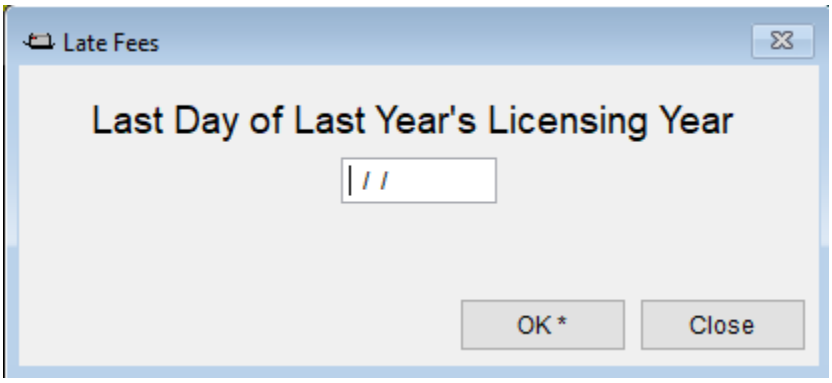
Update Late Fees – FSO/RFE



The purpose of this section is to look for unpaid balances within the date range and to add a late charge to the unpaid ones.

Once you type in the date press “OK.”

Update Late Fees – Mobile

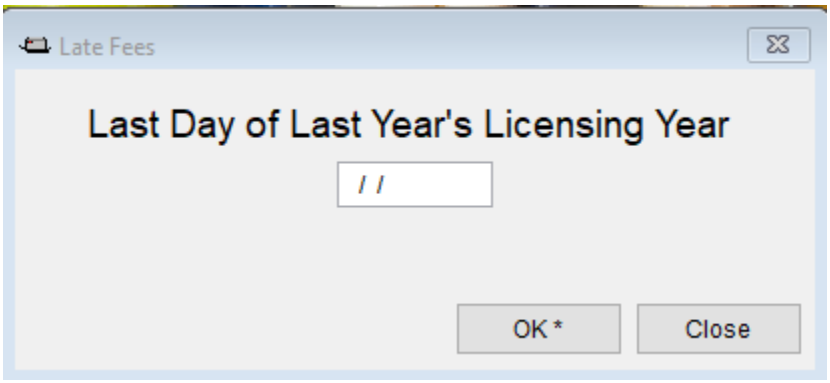


This is similar to the Update Late Fees – FSO/RFE section.

The purpose of this section is to look for unpaid balances within the date range and to add a late charge to the unpaid ones.

Once you type in the date press “OK.”

Update Late Fees – Vending



This is similar to the Update Late Fees – FSO/RFE and Update Late Fees – Mobile.

The purpose of this section is to look for unpaid balances within the date range and to add a late charge to the unpaid ones.

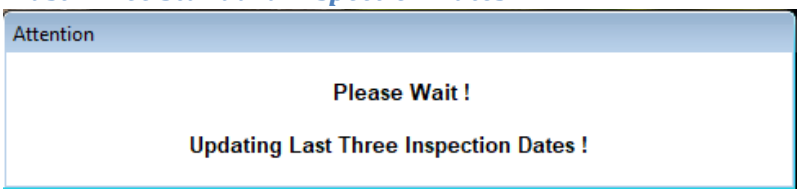
Once you type in the date press “OK.”

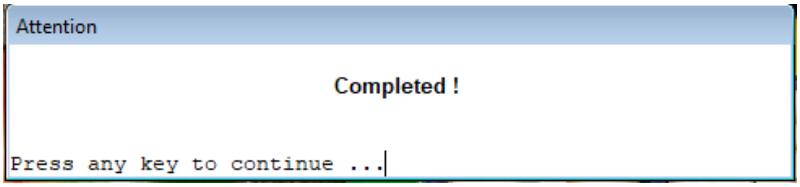
Utilities

- ***Repair Corrupted Export File***

  If there was a file or files that were corrupted on Export, click this section to repair the file.

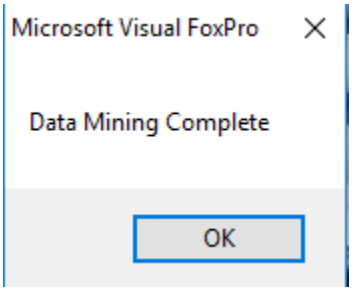
- ***Update 'Last Three Standard Inspection Dates'***





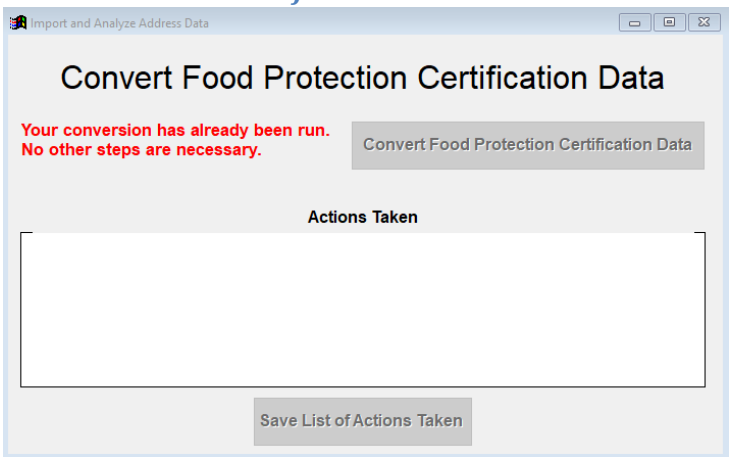
This section is to update the last three standard inspection dates.

- ***Mine Historical Violations Data***



This goes through the comments posted by inspectors and stores data in an easy to understand format for later analysis. This is used to make the chart on the data mining screen work.

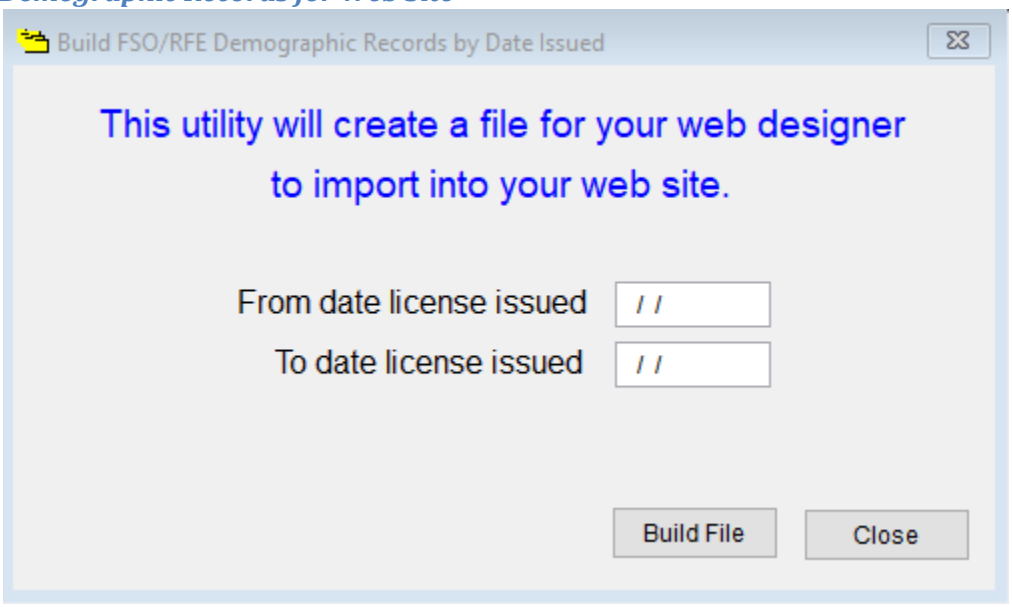
- ***Convert Food Protection Certification Data***



This is to convert the food protection certification data. There is a button to convert, and area that shows the actions taken, and a button to save list of actions taken.

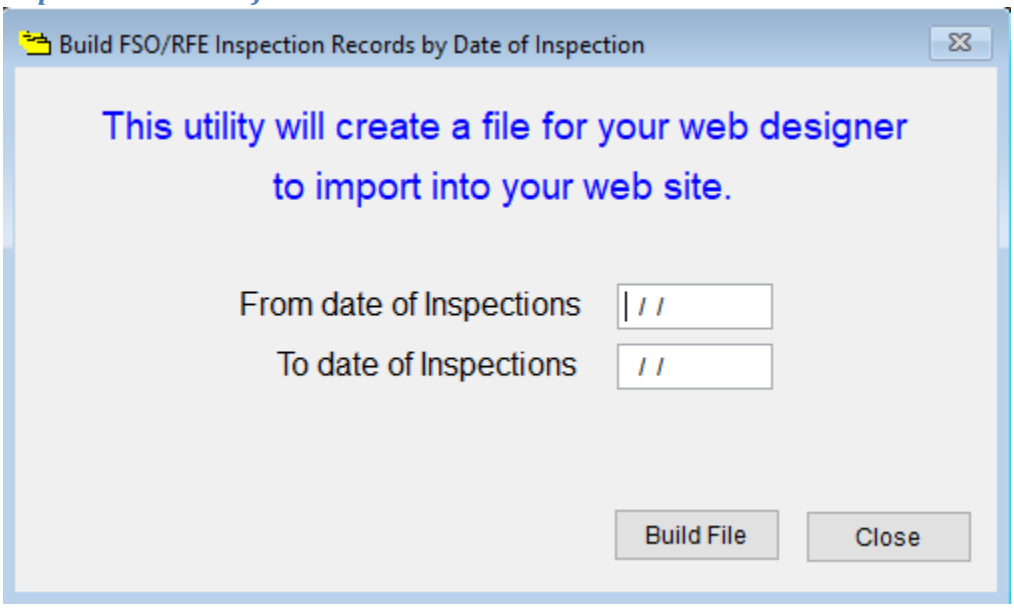
Web Site Exports

- ***Create Demographic Records for Web Site***



This area creates a file of demographic records to import into your website. Enter in the dates for license issued and to date license issued. Click on "Build File" and it will automatically build the file.

- ***Create Inspection Records for Web Site***



This area creates a file of inspection records to import into your website. Enter in the dates for from date of inspections and to date of inspections. Click on "Build File" and it will automatically build the file.