INTEROFFICE MEMORANDUM

**INFORMATION
HSES 09-009**

DATE: August 28, 2009

TO: County Health Department Directors/Administrators
                     Environmental Health and Engineering Directors

THROUGH: Lisa Conti, D.V.M., M.P.H, Dipl. ACVPM, CEHP
                     Director, Division of Environmental Health

FROM: Gerald Briggs, Chief
                     Bureau of Onsite Sewage Programs

SUBJECT: Tracking of OSTDS Managed Systems

INFORMATION ONLY

In response to local legislation, many counties now need to track and manage onsite systems beyond the construction phase. Currently, the state does not require an operating permit for systems that don't fall under one of our Operating Permit categories.

The Environmental Health Database (EHD or Rehost) provides a module called Miscellaneous which will allow counties to track these managed systems. This module can be used to record basic demographic information (owner and contact information, addresses, phone numbers, etc.) for the system property. In addition, it provides for local billing and inspection management. There are also five facility-related fields provided that can be used to specify additional information about the system, such as county permit numbers, system size, system components, or age of the system.

The EHD team has added a Miscellaneous sub-type at the state level called "OSTDS Managed Systems" that should be used for these properties. This will allow for searching and report writing. In the future, we would like to incorporate these managed systems more closely with the OSTDS module. Use of the EHD system to track these systems will allow these data to be more easily migrated into any future management program in the EHD.

Attached is the User Manual for the Miscellaneous module in the EHD. Please contact Kara Loewe at (850) 245-4070 or by email at Kara_Loewe@doh.state.fl.us with any questions.

Attachment

Environmental Health Database (EHD)

DRAFT

ENVIRONMENTAL HEALTH DATABASE
(EHD)

MISCELLANEOUS FACILITIES
User Manual

April 2009

Table of Contents

WELCOME

Welcome to the User Manual for the Environmental Health Database (EHD) Application System for the Miscellaneous Facility functions. This manual is the primary source of information and instruction on how to complete the various tasks related to creating and updating a miscellaneous facility in the State of Florida.

This application is comprised of the current functionality for the Miscellaneous Program functions of the CENTRAX system in a web-based software application available on the intranet at **http://ehd.doh.ad.state.fl.us/rehostrollout/homepage.aspx**

For individuals that are regularly responsible for the Miscellaneous Facilities, this document may serve as a self-directed guide while they learn the EHD System for daily business functionality.

Environmental Health Database (EHD) System
How to begin….

The application begins with the user accessing the Environmental Health Database application via the following link:

Environmental Health Database Application link

http://ehd.doh.ad.state.fl.us/rehostrollout/homepage.aspx

To ensure that the correct page is being viewed, verify that the current page is displayed:

When the EHD link is selected, the system will verify the network login ID of the user to verify the user has access to the EHD system. Please verify that your name appears in the upper right hand corner with the current date, prior to working in the EHD system. In the production EHD, the word "TEST" will not appear under the name Environmental Health Database. This word is only seen in our TEST environment.

Main Menu Page

When the user enters the system, the following page will be shown:
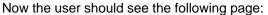

Menu Page Overview:
- Menu Options (above icons)
    o Contains all options available for selection in the Environmental Health Database System

- Menu Options (Center)
    o Contains visual options of programs available in the Environmental Health Database System

Please choose the icon "Miscellaneous" from the **center menu** to begin using the Miscellaneous Module.

Miscellaneous Menu Page
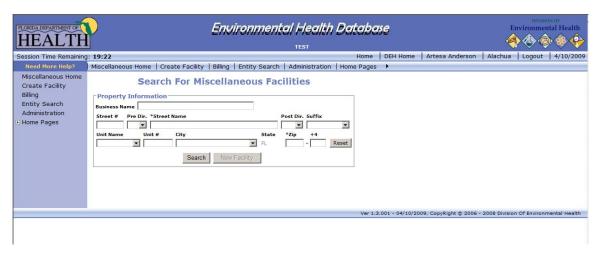
Now the user should see the following page:

This is the Miscellaneous Facility Menu Home Page for the Environmental Health Database System. The Menu Options available are:

- **Create New Miscellaneous Facility**- This option provides the user the ability to create a new Miscellaneous facility
- **Billing**- This option provides the user the ability to access billing to manage fees, including updating current fees.
- **Search County 10 Fields**- This option allows the user to search the county specific fields created by the county administrator for their county.
- **Entity Search**- This option allows the user the ability to search for an existing Miscellaneous facility in the EHD system.
- **Crystal Reporting Center**- This option allows the user to navigate to the crystal reporting center to view or run current reports for Miscellaneous facilities.

From the menu options provided, please choose the "Create New Miscellaneous" option. If done correctly, the user should see the following page:

Create New Miscellaneous Facility

Now the user should see the following page:

This is the Miscellaneous Pre-Search Page. The minimal required to conduct a search on this page is the Business Name or the street name and valid city and zip. On the miscellaneous page, the user can decide to enter the city OR the state to fulfill the search requirement. When the user selects the city from the dropdown, the system will select the corresponding zip code.

Now the user should see the following page:

Once the user enters the search criteria, select the "**Search**" button to conduct the search. If results are found, those results will appear at the bottom of the page for the user to select. If no results are returned, select the "**New Facility**" button to begin the application process.

Facility Information

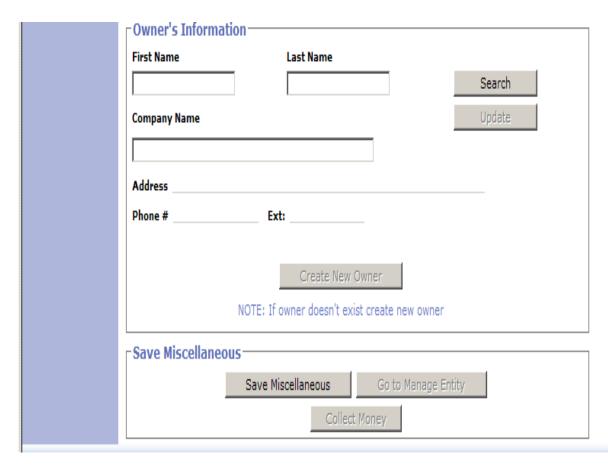When the "New Facility" button is selected, the user will see the following page:

To begin entering the new facility, enter data into the required fields which are noted with a black asterisk. At the top of the page is the required miscellaneous sub type field. This field has county specific sub types so if there is any sub type missing for your county; please contact the EHD project team.

Begin entering the facility information in the required fields. The user may choose a company or a first and last name for a person. At least one is required. If the user chooses to enter a name in the First Name field, then the user must also enter a name in the Last Name field. If there is a need to record more than one person, enter both names in the company name field and leave the first and last name fields blank.
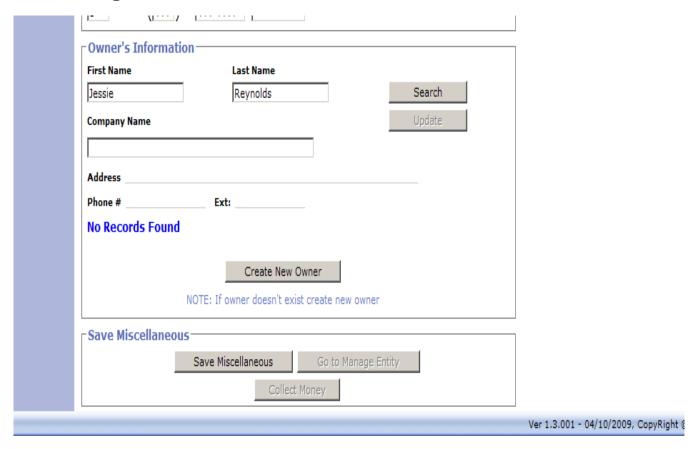
Notice that the address information entered during the pre search has already been populated for the user on this page. The user can continue to add address information here as well as adding a current phone number.

Owner's Information

Owner's Information

First Name	**Last Name**
[ ]	[ ]

Search

Company Name

Update

[   ]

Address _____

Phone # _____ **Ext:** _____

Create New Owner

NOTE: If owner doesn't exist create new owner

Save Miscellaneous

Save Miscellaneous   Go to Manage Entity

Collect Money

After the facility information has been entered, begin entering the owner information for the facility. When entering an owner, the user must first conduct a search to see if the owner currently exists in the system. Enter the first and last name or the company name of the owner then select the "**Search**" button.
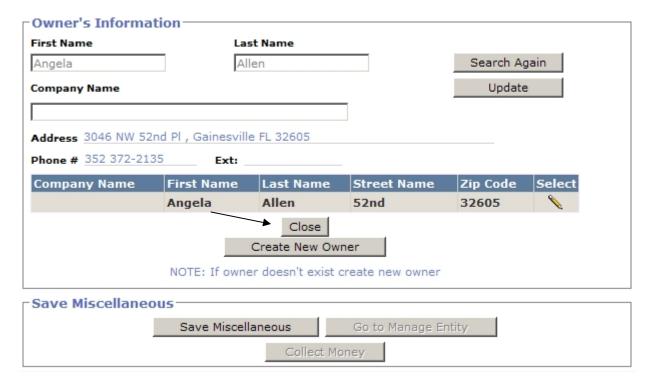
Searching for an Owner

If the person or company is not found in the system, a message of "**No Records Found**" will appear on the screen. If no records are found, the "**Create New Owner**" button becomes available for selection. Please select this button to add the owner to the system.

Selecting an Existing Owner

If the person or company has been found in the system, the owner information will appear on the screen. To select the owner, click the pencil tool.

When the owner is selected, the owner information populates the owner information fields. Verify that this is the correct owner by viewing the details for the owner. If it is not correct, the user can search for another owner by selecting the **"Search Again"** button. If the owner selected will need to be updated, select the **"Update"** button to make any changes to the owner.
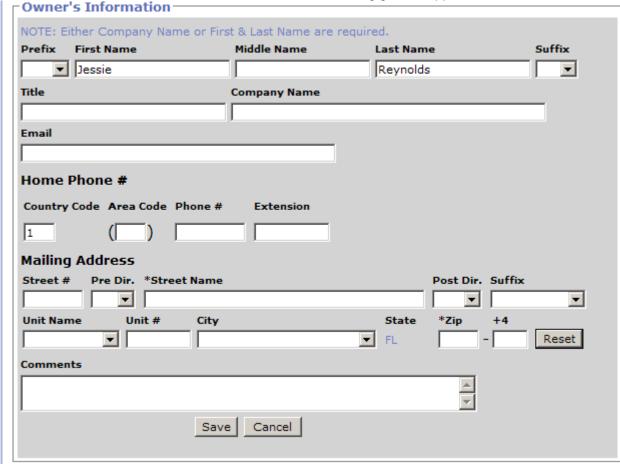

Select the **"Close"** button if this is the correct owner, or select the **"Create New Owner"** button to create a new owner for the system.

When the **"Close"** button is selected, the **"Create New Owner"** button becomes unavailable and the owner details have officially been attached to this facility.

Creating an Owner

When the "**Create new Owner**" button is selected, the following grid will appear:

Notice that the owner information grid is in grey. This background distinguishes the section from the rest of the miscellaneous facility page. Once the user has entered all the owner information, remember to select the "**Save**" button within the grey grid so that all the owner information can be recorded.

Also notice that the search information entered for the owner appears on this page. Optional owner information can be added here such as title, email, phone number, and corresponding company name. The mailing address is required for the owner. As with the pre-search, the user can select the city or zip code from the dropdown list and the system will populate the corresponding field with the correct value.
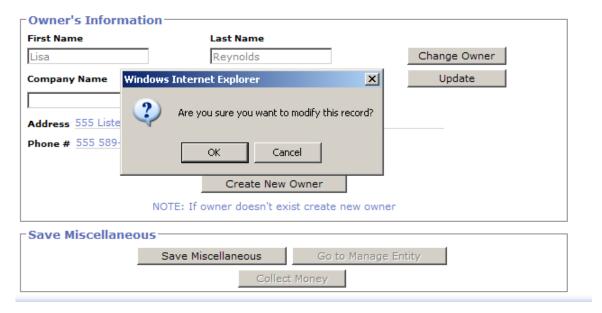
After all the owner information that needs to be captured has been entered, select the **"Save"** button.
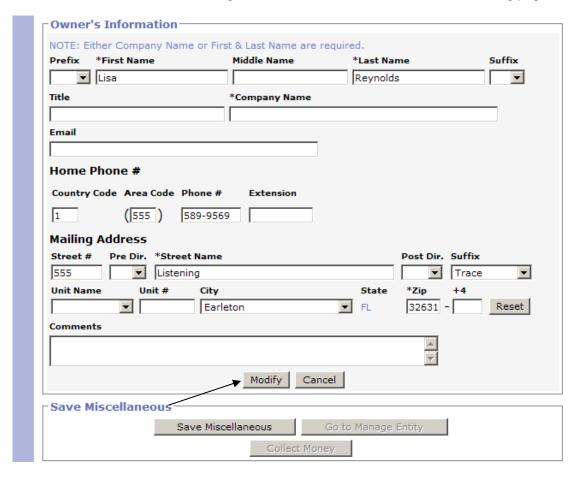
Updating an Owner

Once the owner has been saved to the system, the owner details will appear in the owner information fields. At this point, the owner can be changed by selecting the change owner button. When this button is selected, the system will ask the user to verify that they want to change the owner by displaying a message box. Once you agree to change the owner, the owner details will be wiped from the page and the search button becomes available to the user to enter another owner name to search for. Repeat the steps for selecting an owner when deciding to change the owner.

If the user wants to update the current Owner simply select the **"Update"** button on the right-hand side of the owner details. When the "Update" button is selected, a pop up message appears to confirm that the user wants to modify this record, as shown in the picture below.

Verify that the record will be modified by selecting the "OK" button on the message box.
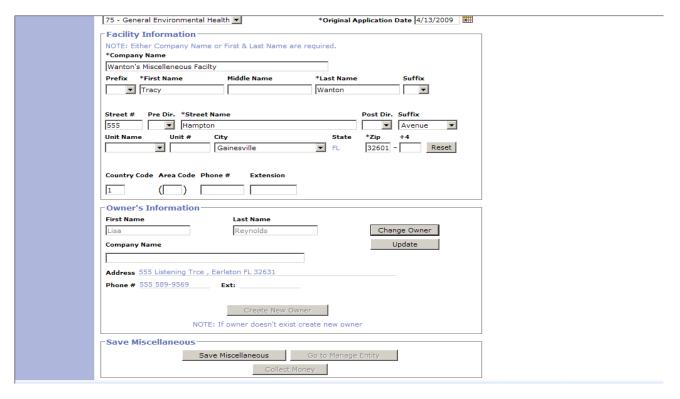
When the "OK" button on the message box is selected, the user will see the following page.

Begin making any updates to the owner within the grey owner information section. Please remember that any changes to an existing owner on an application page will also update that owner's information on other records that he or she is attached to.
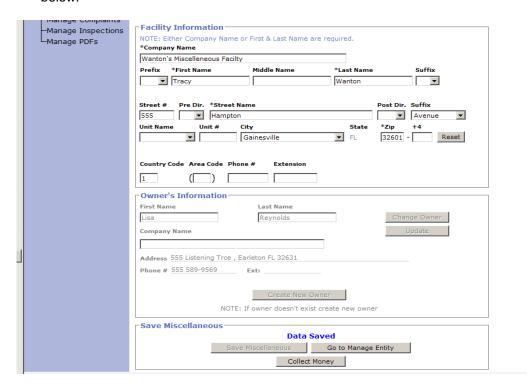
When all updates have been made, select the "**Modify**" button to save the changes.
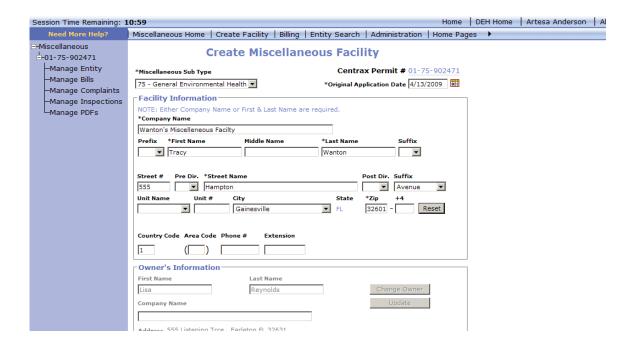
Save Miscellaneous Facility

When all of the appropriate information has been added to the miscellaneous facility, select the "**Save Miscellaneous**" button to save the facility to the system.

When the "**Save Miscellaneous**" button has been selected, the "**Data Saved**" message will appear as below:

The data saved message verifies that the facility has been saved to the system. Once the facility has been saved, the "**Go to Manage Entity**" button and the "**Collect Money**" buttons will appear for the user to select.

The look of the Create Miscellaneous Facility page changes as well, when the facility is saved.

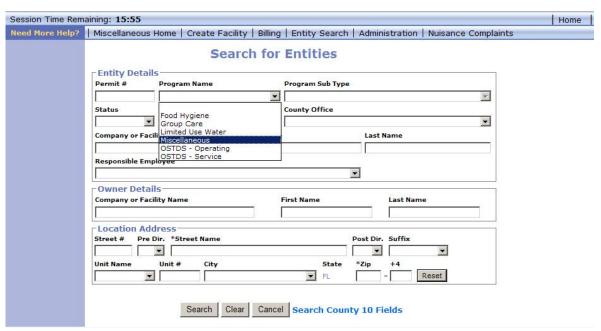The following features now appear on the page:

- ❖ Permit Number now appears in the tree diagram and in the right hand corner
- ❖ **Manage Entity** is available in the tree diagram
  - o The user can navigate to the entity page to manage all areas related to the facility from this link
- ❖ **Manage Bills** is available in the tree diagram
  - o The user can create and manage bills for Miscellaneous facilities from this link
- ❖ **Manage Complaints** is available in the tree diagram
  - o The user can create a new complaint for the facility from this link
- ❖ **Manage Inspections** is available in the tree diagram
  - o The user can manage inspections related to the facility from this link
- ❖ **Manage PDFs** is available in the tree diagram
  - o The user can access and reprint PDFs generated in the system for this facility

Once the facility has been added and saved to the EHD system, the user will no longer be able to access this page to manage the facility. This application page is a quick entry page that is only available during the initial creation of the facility. To manage the facility, select the **"Go to Manage Entity"** button at the bottom of the page, or the **"Manage Entity"** link from the tree diagram.

Search for a Facility

Once a facility has been created via the quick entry application page, the user can access that facility by using the Entity Search function. This search can be found on the Miscellaneous main menu page.
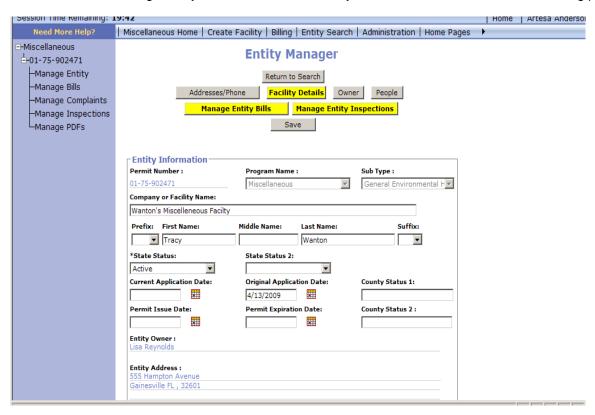

To search for a Miscellaneous facility, enter the permit number or select the "Miscellaneous" program type from the Program Name list. If only the program type is selected, the system will return all Miscellaneous facilities for the county specified. The user also has the option to search by owner details or location address if this information is known.

Facility Details

When the "Go to Manage Entity" button is selected, the system will direct the user to the following page:

There are various modifications that can be made to an entity from the manage entity page. The range of features includes adding additional addresses, phone numbers, and owners to the system, as well as managing entity bills and entity inspections. Any button that displays in yellow signals to the user that no information has been entered for this feature. To update the entity with the correct information, simply click on the yellow button and add the entity information.

When the Facility Details button is selected, the user will see the following page:
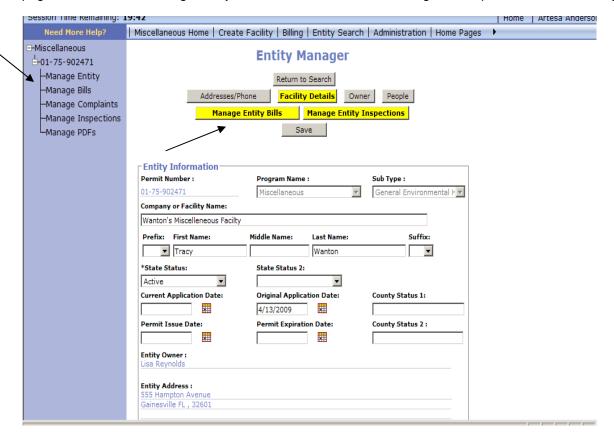

The facility information displays at the top of the page. This information is based upon information entered in the initial quick application. The next section, Miscellaneous Details, contains county specific fields to track additional information. The field name such as Field 1, Field 2 etc, cannot be modified. The counties will have to communicate with their users as to what these fields mean so that they can be used appropriately and consistently.
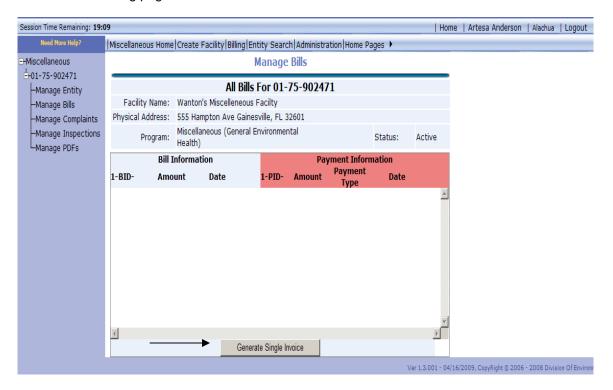
The final section, Non Emergency Medical Transport data is available for counties to add their county specific information for non emergency medical vehicles. Notice that none of the fields on this page is required by the system. Again, this page is mainly for counties to track their additional county specific information.

Manage Entity Bills

To move to the manage entity bills section of the manage entity page, return to the main entity manager page and select the "Manage Entity Bills" button or select the "Manage Bills" option from the tree diagram.

When the "Manage Entity Bills" button is selected on the manage entity page, the system will direct the user to the following page:

Here, on the manage bills page, the user can create a new bill for the facility by selecting the "Generate Single Invoice" button. The user can also review bills created previously for the facility. If there have been any bills generated for the facility, those bills will show in the center grid along with the payment amount, date, and payment type.
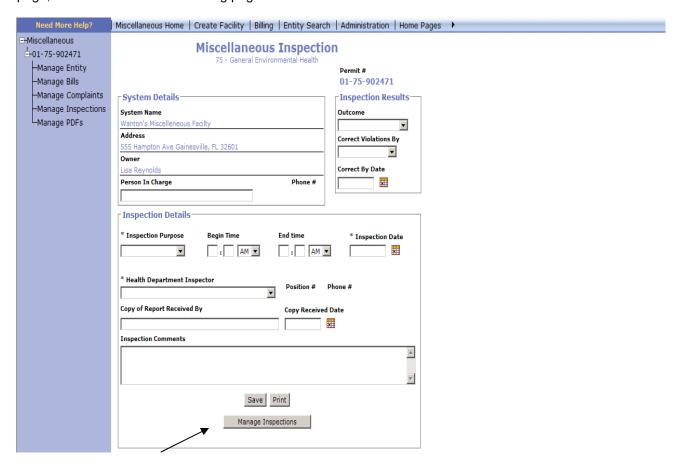
Manage Entity Inspections

When the "Manage Entity Inspections" button is selected on the manage entity page, the system will direct the user to the following page:

Current entity inspection details appear in the middle grid with data such as the next inspection date and frequency of inspections. The user has the opportunity to review these inspections, update the next inspection date, and change the frequency of the inspections. Once updates are made, make sure that the "**Save**" button is selected.
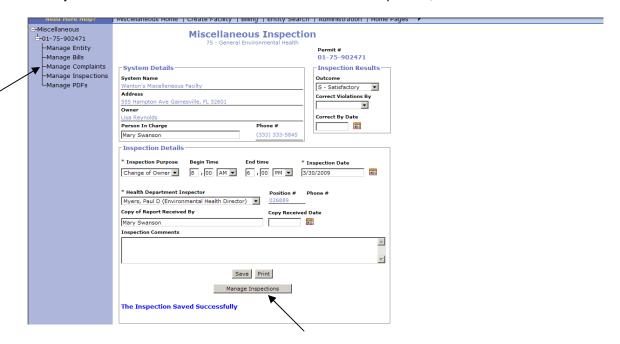
Located at the bottom of the page is a link to create a brand new miscellaneous facility inspection for this record. Select the "New Miscellaneous Facility Inspection" button.

When the "New Miscellaneous Facility Inspection" button is selected on the manage entity inspections page, the user will see the following page:

The system defines required fields by a black asterisk next to the name on the inspection page, just like it does throughout the rest of the EHD application. Enter in all the required fields, plus any other information that has been gathered during the inspection process. In order to save the new inspection entered, select the "Save" button located at the bottom of the page. To print the new inspection, select the "Print" button located at the bottom of the page. To return to the main manage inspections page, select the "Manage Inspections" button located at the bottom of the page.

Once you have entered all the data for the Miscellaneous Inspection, select the "**Save**" button.

Once the "Saved Successfully" message is shown at the bottom of the screen, the inspection data has been saved to the database. The user can navigate back to the inspections page by selecting the "Manage Inspections" button, or by selecting "Manage Inspections" from the tree diagram.
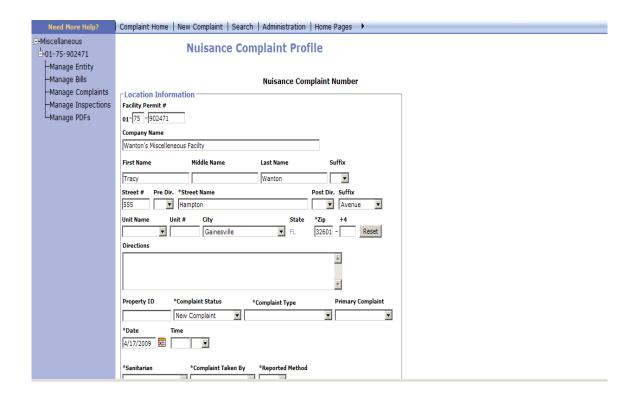
Manage Entity Complaints

When the "Manage Complaints" button is selected from the manage entity page, the system will direct the user to the following page:

On the manage complaints page, the user can select a current complaint which will display in the center grid, once created, or select to create a new complaint for the current Miscellaneous facility by selecting the "Create New Complaint" button.

When the "Create New Complaint" button is selected, the system will direct the user to the Nuisance Complaint Profile page for entry.
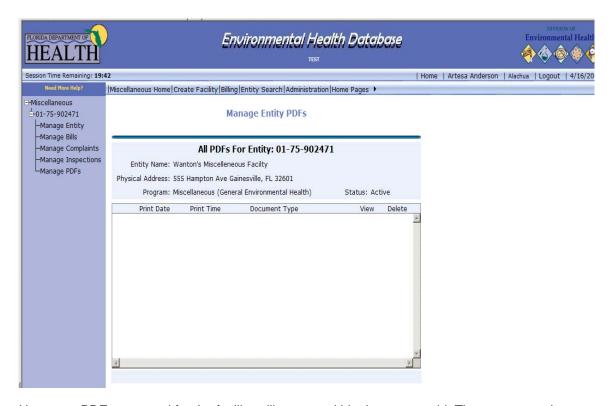
Notice that the facility information has already been populated for the user.

To navigate back to the Miscellaneous facility entity page, select the "Manage Entity" link from the tree diagram.

Manage Entity PDFs

When the "Manage Entity PDFs" button is selected from the manage entity page, the system will direct the user to the following page:

Here, any PDF generated for the facility will appear within the center grid. The user can select an available PDF and re-print it. No modifications can be made to a PDF from this page. Users will only be able to print a PDF once it has been created within the application.

Leaving the Application

The application is set up to allow the user to exit the system at any time during the application process. As stated earlier, it is always wise to save any changes made to the system at anytime to ensure that the data is not lost. If no activity is detected within 20 minutes, the system will automatically time out the session and the user will have to restart the application by closing the current browser and opening a new one. A new browser should also be opened if at anytime an error occurs on the page.

In order to exit the system, the user should choose the logout link located on the top menu bar. Once the user has logged out of the system successfully, a notification message displays on the screen that the user has logged out. The user may close the browser window at this time.

Remarks

Thank You for reviewing the Environmental Health Database (EHD) user manual for the Miscellaneous Facility Application. The Environmental Health Database Analyst Team consists of the following:

- ❖ **Artesa Anderson**
  Lead QA/Training Analyst for the Environmental Health Database Application

- ❖ **Yera Patel**
  QA Analyst for the Environmental Health Database Application

- ❖ **Kiran Barad**
  Senior Business Analyst for the Environmental Health Database Application

- ❖ **Kristen Reynolds**
  Senior Business Analyst for the Environmental Health Database Application

- ❖ **Norman Doxford**
  Environmental Specialist III; CENTRAX/EHD Subject Matter Expert

- ❖ **Donna Dixon**
  Project Manager for the Environmental Health Database Application

For inquiries or issues related to the EHD system, please contact the project team in any of the following manners:

- ❖ **Hepdesk Ticket:**

  http://adminapps35.doh.ad.state.fl.us/ITCSC/RequestAddUser.aspx?CSC=Yes

- ❖ **Email:**

  _c3531@doh.state.fl.us

- ❖ **Phone:**

  (850) 245-4You or (850) 245-4968