



WebEHRSmobile² Users Guide

Data Sync/Download, Survey Form, RCP Form

Version: .02

Table of Contents

1 Document History	4
2 Acronyms and Definitions	4
3 Introduction	5
3.1 Logging In	5
3.1.1 Forgot Password	6
3.1.2 Changing Server Settings	6
3.2 Apps List	6
3.3 Options.....	7
3.3.1 Settings.....	8
3.3.2 Logout	9
4 Data Sync/Download.....	10
5 Survey Form	12
5.1 Demographics	14
5.2 Survey History	17
5.3 Inspection Header	20
5.4 Update Establishment.....	21
5.5 Line Items	23
5.6 Deficiencies	24
5.7 Food Samples Taken	29
5.8 Liquid Waste Sampling.....	31
5.9 Drinking Water Sampling	32
5.10 Introductory Comments.....	33
5.11 Inspection Footer	34
5.11.1 Add/Change Email Address.....	37
5.12 Finish (Upload) Form.....	39
6 RCP Form.....	42
6.1 Create New or Update Existing	43
6.2 Demographics	45
6.3 RCP Information	47
6.4 RCP Findings.....	51

6.5 Add Activity 54

6.6 Activity Element Data Indicators..... 58

6.7 RCP Footer 60

6.8 Finish (Upload) Form..... 65

6.9 Discard Session..... 66

6.10 Email Addresses 68

1 Document History

Version	Date	Comments
.01	9/22/2022	Initial document creation
.02	1/4/2024	MiApps screenshots changed for SmartForms

2 Acronyms and Definitions

Acronym/Term	Definition
Form	For the purposes of this Users Guide, form refers to the electronic forms that are accessed from the Apps List. This document details the Survey Form and RCP Form.

3 Introduction

The WebEHRSmobile² product is a mobile application that supports Environmental Health regulation and compliance activities through utilizing a mobile device or tablet, then syncing to the web system database. This guide contains instructions for completing Data Sync/Download, Survey Form, and RCP Form.

3.1 Logging In

Once SmartForms is downloaded, a Log In page will display. From the Log In page users can sign into the application, retrieve a forgotten password, configure using a QR code, change server settings provided by customer support, or sign up as a new user.

To log in:

1. Enter your Username.
2. Enter your password.
3. Click **Login**.



Username

Password

Login

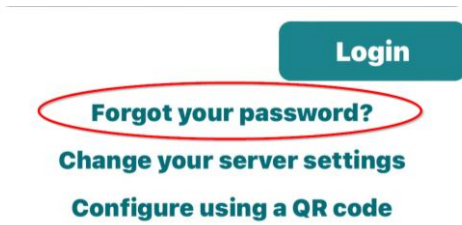
[Forgot your password?](#)

[Change your server settings](#)

[Configure using a QR code](#)

3.1.1 Forgot Password

If you have forgotten your password, select **Forgot your password?** from the Log In page.



You will be prompted to enter the **Customer Name** and **Username** to reset the password.

3.1.2 Changing Server Settings

Server settings are provided by CDP customer support. These settings are uploaded automatically and should not change. If settings are lost, configure the QR code again from the Log In page.

3.2 Apps List

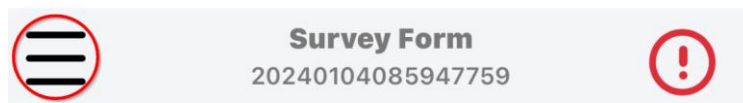
Once logged in to SmartForms the Apps List will display. The Apps List provides a list of all applications the user is able to access. This list displays the app's name, version and revision number, and published date/time. Clicking on an app name will start a new instance, or session, of that app. The number to the far right of the app's information displays how many in-process sessions exist for that app. The orange bar moving across the top portion of the screen indicates that the server is searching for any available updates to the forms listed.

Form Name	Version	Revision	Published	Count
Data Replication Update (CDP Only)		Rev 2	24 Sep 2022 08:29	0
Data Sync/Download	Version 1.0 2/11/2022	Rev 3	15 Mar 2023 15:32	0
RCP Form	Version 1.0 10/12/2022	Rev 3	25 Jan 2023 14:42	0
Survey Form	Version 1.0 2/12/2022	Rev 17	14 Dec 2023 14:38	2
Test SQL Form		Rev 3	09 Nov 2023 08:15	0

Sync
Last sync: 04 Jan 2024 08:58:57

3.3 Options

When a form is open, the Options list can be accessed by clicking the pancake button at the top left of the page as shown below.



Optional Search Filters

Establishment Type


The Options list allows a user to view any App Rules/form violations, print, save the current session without uploading, close the current session, finish/upload a session, or discard a session.

3.3.1 Settings

The Settings page gives access to Server Settings and Advanced Settings by clicking **Change your server settings**.

Username

Password



Login

[Forgot your password?](#)

[Change your server settings](#)

[Configure using a QR code](#)

3.3.1.1 Server Settings

The Server Settings page displays the Hostname, Port, URL Prefix and Customer Name. Server settings are uploaded automatically and should not be changed. If settings are lost, configure the QR code again. Contact Customer Support for settings issues.



Server Settings

< Back

Hostname

mobilep11.cdpehs.com

Use Secure Connection

Don't Use Secure Connection

Port

443

URL prefix

MFS

Customer name

IHS2mobile7



3.3.2 Logout

To logout from any page, select the pancake button at the top left, then select **Logout**. Using the logout link will exit out of the app and return to the login page.

4 Data Sync/Download

Before starting any form, it is recommended to complete a data sync/download of establishment data and history so that the most recent data is downloaded to the mobile app. It is recommended to perform a data sync/download at least once a day prior to going out to do a day's work.

1. To perform a data sync/download, click **Data Sync/Download** on the Apps List.
2. From the Download page, select **Download Establishment Data**. A message will appear when the download has been completed successfully.

Data Sync/Download
2024-1-4 10:02

CDP Inc.

User First/Last Name	User Email	Data Resources
John Grady	john.grady@	IHS_060 IHS_060Hi

EHS Number

Automatically go to Violations Page?
 Yes No

Download Establishment Data

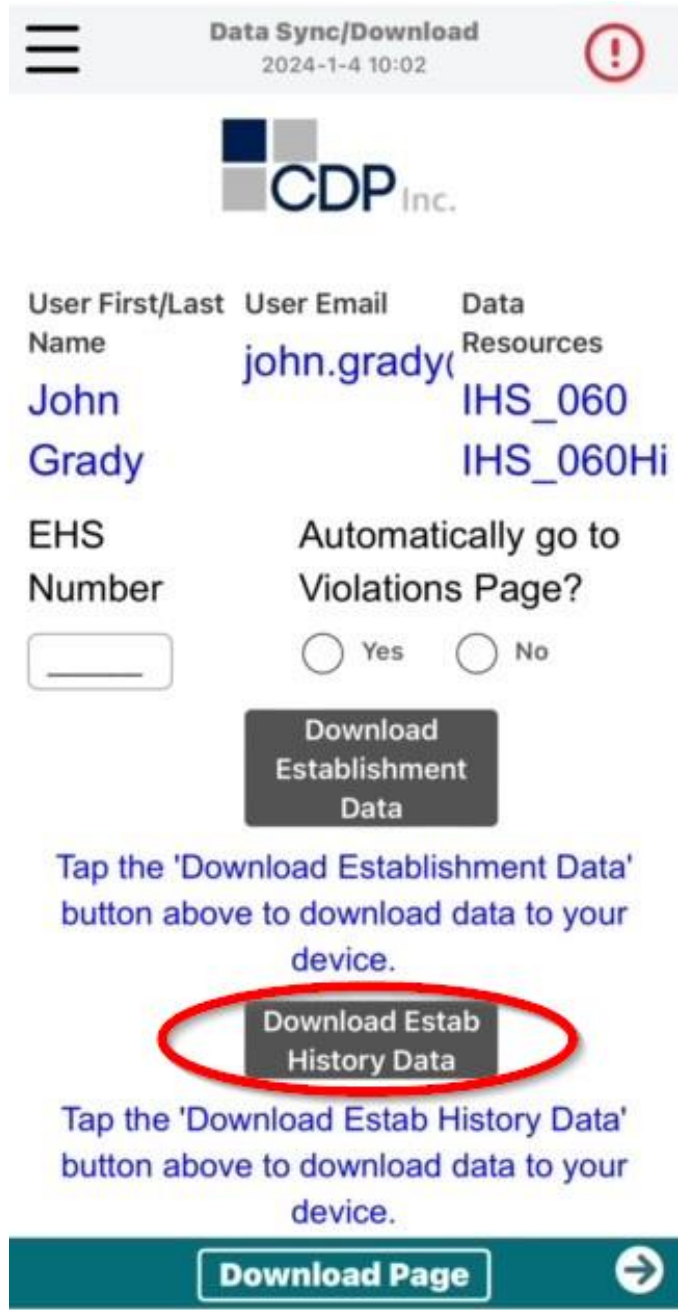
Tap the 'Download Establishment Data' button above to download data to your device.

Download Estab History Data

Tap the 'Download Estab History Data' button above to download data to your device.

Download Page →

3. Select Download **Establishment History Data**. A message will display when the download has been completed successfully.



4. Using the Menu in the top left of the page, select **Discard** or **Close** to return to the Apps List.

5 Survey Form

1. To access the Survey Form from the Apps List, click **Survey Form**.

You do not need to be connected to the internet to complete this form if Data Sync and Download were already performed, however you will need internet access to upload the completed form to the web system.



The Survey Form will display.

Survey Form
20240104100319752

Optional Search Filters

Establishment Type
Select an option

Service Unit Community
Select an option

Tribe Reservation
Select an option

Establishment Search
(Searches Name, Address, Est Number, City) Sear...

Establishments
Tap here to see list (0 items)

Survey Type
Select an option

Status
Estab Type
Premises Name

Demographics

All fields highlighted in yellow are required fields. Additionally, if a red circle with “x” is displayed at the top left portion of the page that indicates that there are missing required fields on the form. Clicking the red icon will display a dynamic list of fields by line item that need to be addressed. The form cannot be finished until all app rules are satisfied. Once all required fields are completed the red circle will change to a green circle indicating successfully completing all required fields.

5.1 Demographics

Survey Form
20240108150612148

Optional Search Filters

Establishment Type
Select an option

Service Unit
Select an option

Community
Select an option

Tribe
Select an option

Reservation
Select an option

Establishment Search
(Searches Name, Address, Est Number, City) Search

Establishments
Tap here to see list (0 items)

Survey Type
Select an option

Status

Estab Type

Premises Name

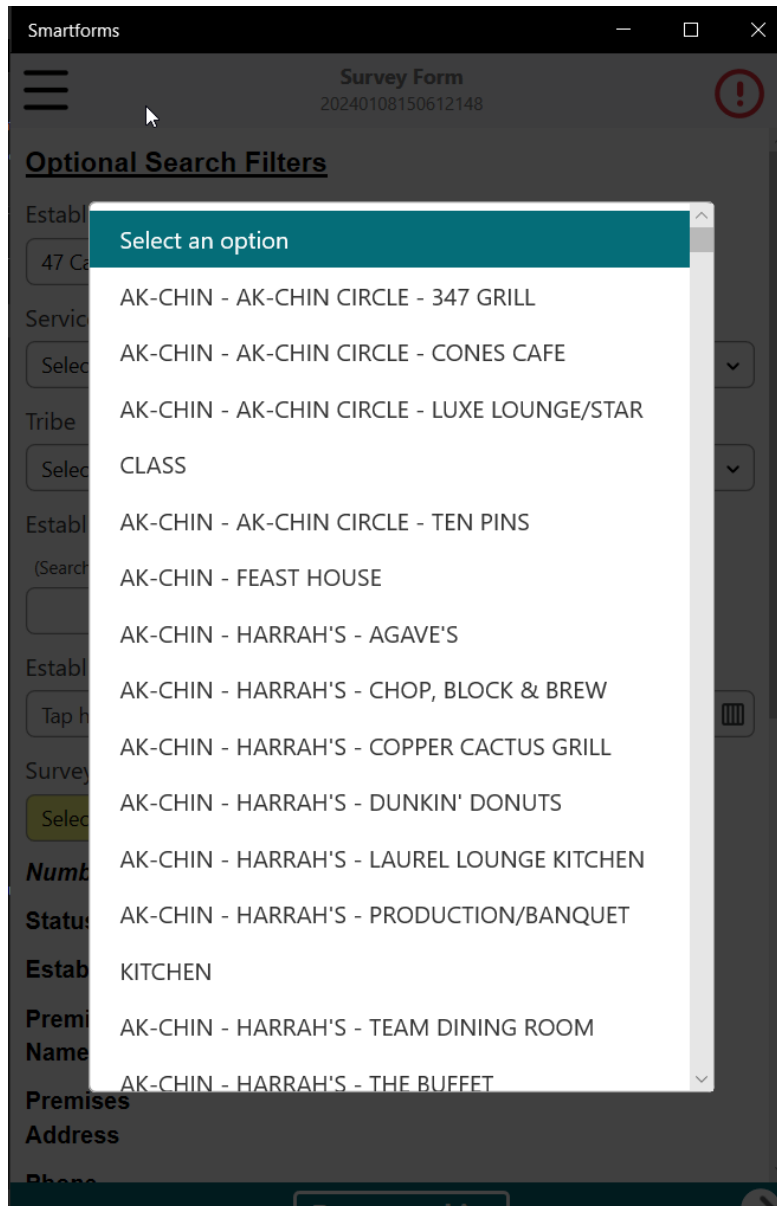
Premises Address

Phone

Demographics

1. Select an **Establishment** by tapping on the Establishments field. Tapping the grid icon will display a more detailed list. To narrow down the list of establishments, the optional search filters at the top of the form can be used to select Establishment Type, Service Unit, Community, Tribe, Reservation, or search by Establishment Name, Address, Establishment Number, City.

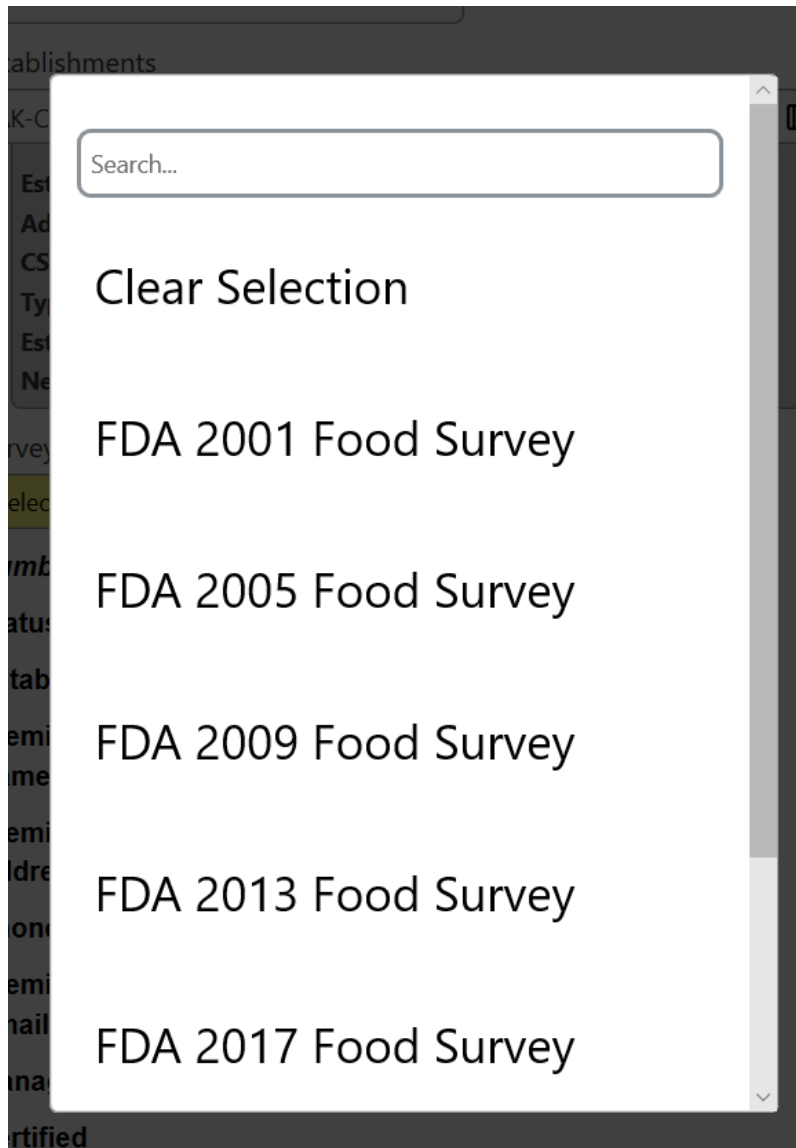
Establishments
Tap here to see list (0 items)



2. After an establishment is selected from the list, click **Close** to return to the Survey form.
3. Select a **Survey Type**.

Survey Type

Select an option ▼



Once an establishment and survey type have been selected, the establishment demographics information displays at the bottom of the screen. The available demographics information is based on the information loaded during the Data Sync and Download.

Establishments

AK-CHIN - FEAST HOUSE

Establishment: AK-CHIN - FEAST HOUSE
Address: 16657 N. Church Street
CSZ: Maricopa, AZ 85139
Type: 47 Cafe/Restaurant
Est Number: 6066471305
Next Insp Date: 10/21/2024

Survey Type

FDA 2017 Food Survey

Number of Establishments found = 432. Updated at 15:08:52



Status Open
Estab Type 47 Cafe/Restaurant
Premises Name AK-CHIN - FEAST HOUSE
Premises Address 16657 N. Church Street
 Maricopa, AZ 85139
Phone (Cell) (602) 717-3761 Flower Ruelas
Premises/Owner Email Fruelas@ak-chin.nsn.us
Manager

Demographics

- **NOTE:** When there is no data provided in a field it is due to no data being added on the web system. To populate that information in the future, the user would need to log in to the web system, enter the demographic information, then run the Data Sync and Download again.
- 4. Complete all required fields of the Demographics page highlighted in yellow.
- 5. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.2 Survey History

The Survey History page of the Survey form displays previous surveys completed for the selected establishment. For each survey the Survey Date, Purpose, Type, Number of Deficiencies, Number of P/Pf, Number of Repeat, and Comments is shown.

 **Survey Form** 
AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_2024010815164...

Survey D...	Purpose	Type	# De...	# P/...	# Re...
2023-01-11	Routine	FDA 2017 Food 9 Survey	9	7	
2022-05-17	Routine	FDA 2017 Food 3 Survey	3	3	
2021-11-30	Routine	FDA 2017 Food 4 Survey	4	4	



1. To view a previous survey in detail, tap on the survey. It will highlight in blue and display the survey in detail.

Smartforms _ □ ×

Survey Form
 AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240108151646693 !

Survey Date...	Purpose	Type	# Defici...	# P/Pf...	# Repe...
Survey					
2022-05-17	Routine	FDA 2017 Food Survey	3	3	
2021-11-30	Routine	FDA 2017 Food Survey	4	4	
2021-04-23	Routine	FDA 2017 Food Survey	3	2	

Copy This Survey

Print This Survey

Deficiencies for Selected Survey

Line Item	Code	Deficiency	Comments	R	C...	C...	Corr
6: Proper eating, tasting, drinking, or tobacco use	2-401.11	Eating, Drinking, or Using Tobacco	Item #6 Personal beverage was stored above prep table. Employee beverages shall have a lid and straw and shall not be stored above food, prep areas, or clean equipment/utensils. PIC discarded beverage.	Yes	Yes	Imme	
8: Hands clean and properly washed	2-301.12	Cleaning Procedure [P]	Item #8 Line cook was observed	Yes		Imme	

Introductory Comments

←

Survey History

→

Each line item deficiency for the selected survey is displayed as well as introductory comments.

From the Survey History page, an existing survey can be copied to a new survey or printed.

5.3 Inspection Header

Smartforms

Survey Form
AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240108151646693

Survey Date: 01/08/2024

Survey Purpose: Select an option

Time In (formatted): HH:mm

Time Out (formatted): HH:mm

Travel Hours:

Travel Minutes:

Related R/C/P Title:

R/C/P Title: Tap here to see list (0 items)



1. Select the **Survey Purpose**.
2. Enter **Time In** and **Time Out** of inspection by using the clicking on and using the time picker tools or using the **Now** button to log the current time.
3. Optionally, enter Travel Hours and an R/C/P from the list, if any exist, by clicking the grid icon.
4. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.4 Update Establishment

3:23 📶 📶 🔋

Survey Form ⚠️
AK-CHIN - AK-CHIN CIRCLE - 3...

Clear Latitude/Longitude to not update the Establishment with the value.

Latitude Longitude GPS Tap... 🌐 Set Lat/Lon

Manager First Name Manager Last Name
Andre Thompson

Certified Manager:

First Name Last Name

Number Expiration Date
MM/dd/y 📅

Phone Ext Type


Establishment:

Address

Address Line 2

← Update Establishment →

The Update Establishment page of the form allows the user to update any information on the establishment, if any changes are needed. The page is split into sections for Certified Manager, Establishment, Mailing, and Owner information.

3:26   

 **Survey Form** 
AK-CHIN - AK-CHIN CIRCLE - 3...

Address Line 2

City State ZIP

Email

Phone Ext Type

Fax

Note: Establishment Email can be changed on the Email Addresses page.

Mailing:

Address

Address Line 2

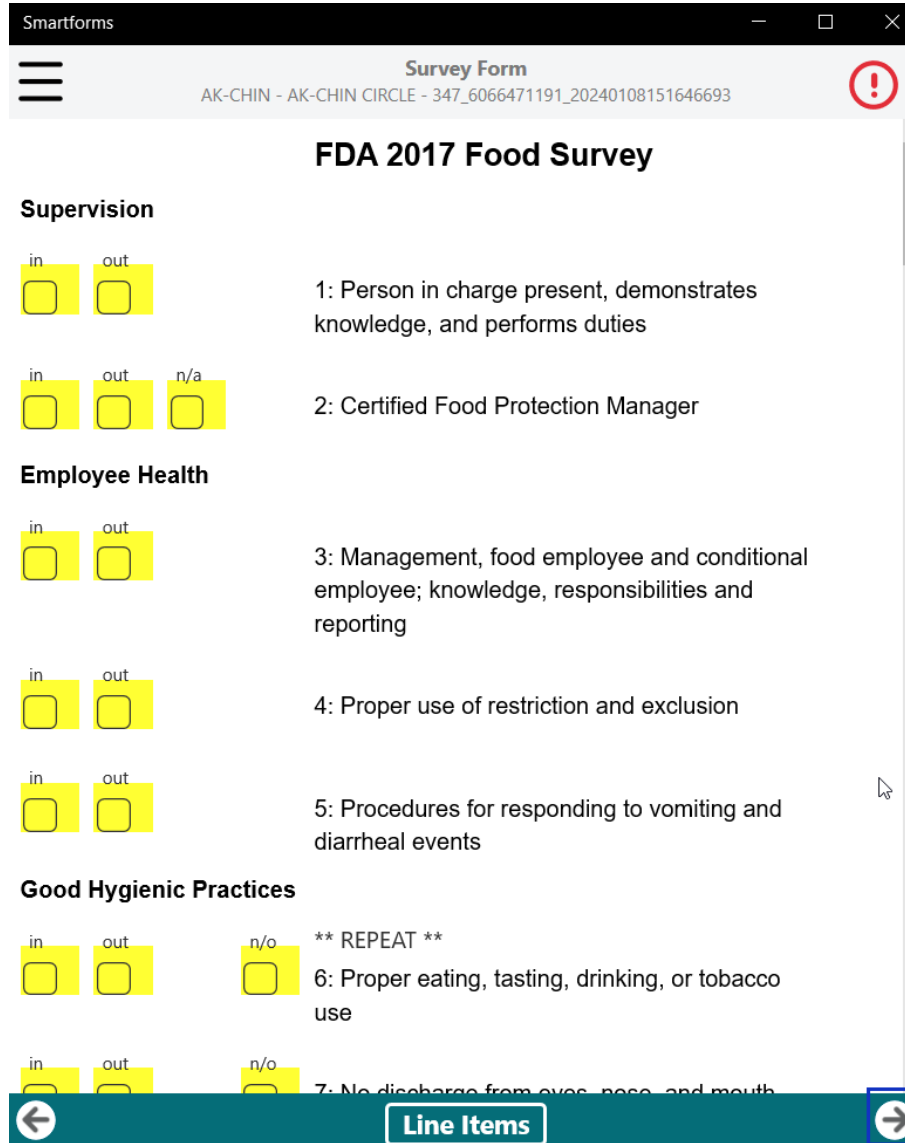
City State ZIP

 **Update Establishment** 

1. Make any updates if needed.
2. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.5 Line Items

The Line Items page allows the user to notate whether the establishment is in or out of compliance for each line item. The verbiage on line items will be different based on which survey type is selected. All highlighted fields are required and must be completed.



The fields down the left side of the page indicate whether the corresponding line item is in or out of compliance. In the following example, the first line item, “1. Person in charge present, demonstrates knowledge, and performs duties” is checked as being in compliance.

Supervision

in out

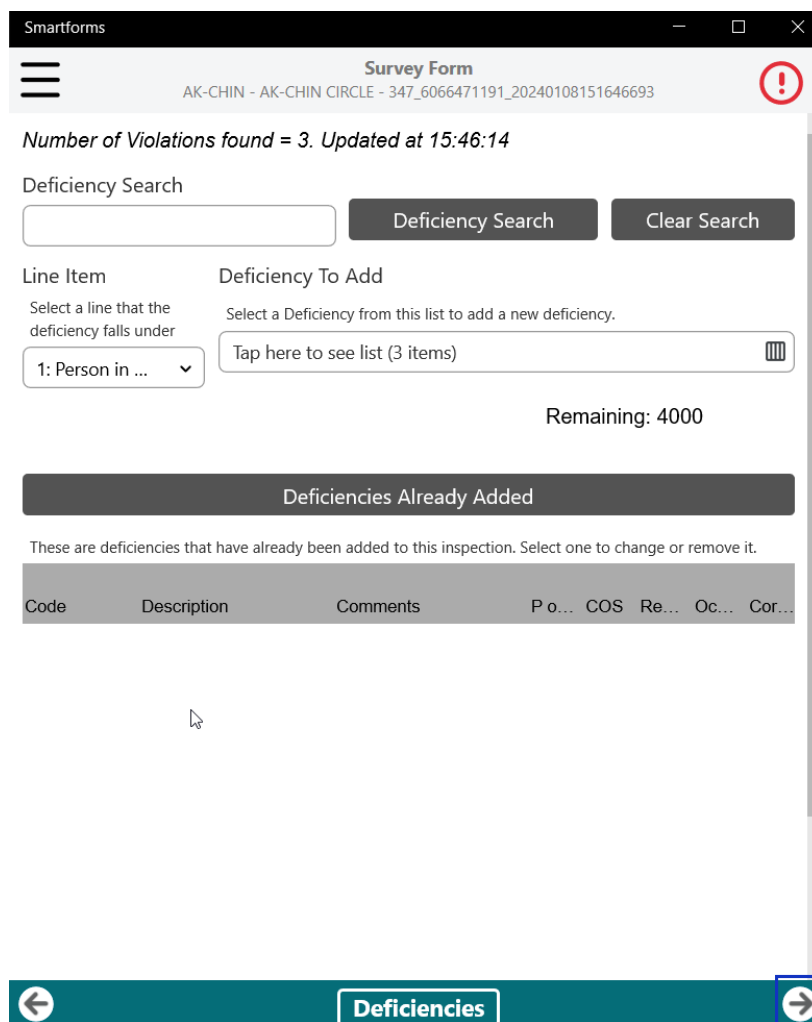
1: Person in charge present, demonstrates knowledge, and performs duties

1. Complete all required line items by checking the appropriate compliance fields.
- **NOTE:** Any line items marked as **out** of compliance will be highlighted. Any violations out of compliance must have a deficiency entered before the entire form can be complete. The comment will be entered on the Violations page.

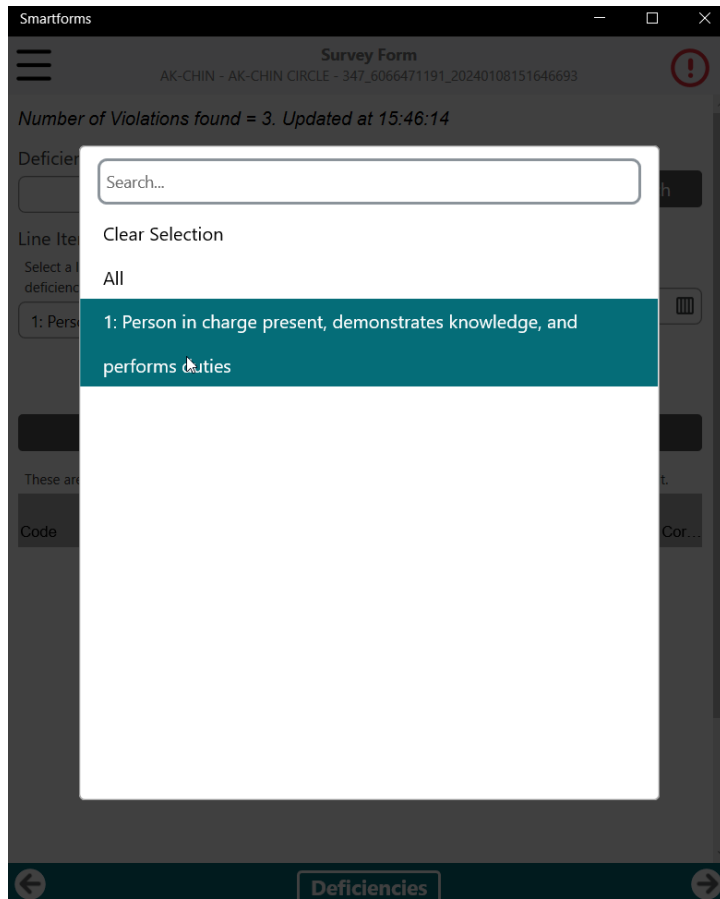
Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.6 Deficiencies

The Deficiencies page displays any of the out-of-compliance violations from the previous Line Items page and associated comments.



1. To add a deficiency, select a **Line Item** that the deficiency falls under.
2. Tap the **Deficiency To Add** field and select a deficiency from the list.



The deficiency line will highlight blue/green.

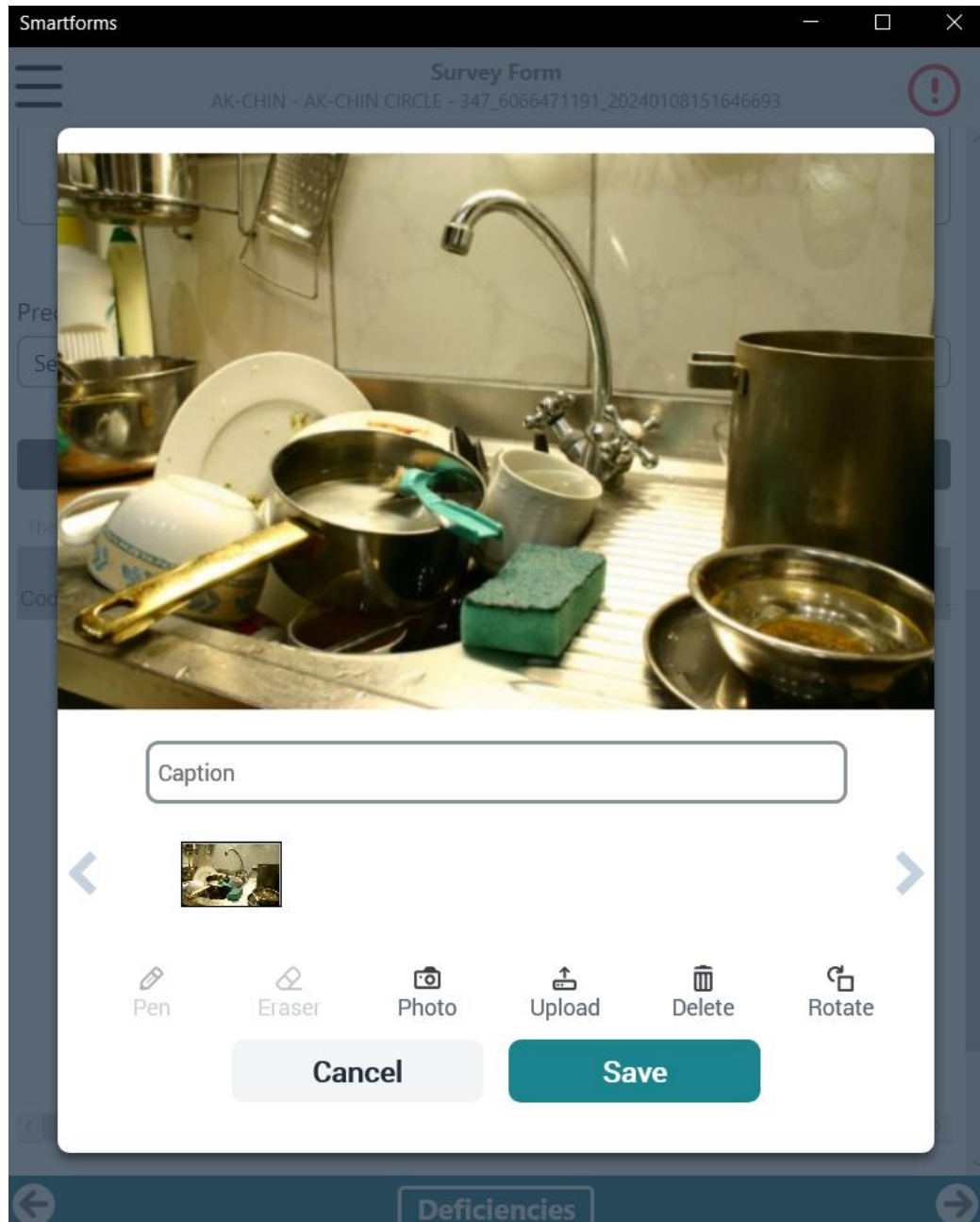
3. Click **Close**.

4. Select **P or PF** (if applicable), **Repeat**, or **COS** (Corrected on site).
5. Select a **Correct by** timeframe or date.
6. Enter the **# of Occurrences**.
7. Manually enter **Deficiency Comments** or tap the **Predefined Comments** and select a comment.
8. Enter any **Deficiency Images** by tapping the image icon to upload an image.

9. Click **Save**.

The deficiency and comment(s) will be added to the **Deficiencies Already Added** list at the bottom of the page.

10. To add an image to the violation, tap the **Deficiency Images** icon. A new window will display for adding an image.



11. To take a photo using the camera on the device, select the **Photo** button, or upload an existing image from the device by selecting the **Upload** button. Once a photo is uploaded, the image can be rotated by selecting the **Rotate** button.

12. Click **Save**.
13. Enter a description of the image in the **Caption** field below the photo.
 - **NOTE:** It is important to indicate which deficiency the image pertains to in the description text.
14. Once the photo and any annotations are ready to save to the violation, click **Save**. The photo will display under **Deficiency Images**. Multiple photos can be added by following the same steps.
15. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.7 Food Samples Taken

The Food Samples Taken page displays any food temperatures recorded during a survey.

Smartforms

Survey Form
AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240109133933923

Food Samples Taken

Observations	Food Item	Location	Temperature

Total # of items recorded: 0

Observatio	Food Item	Location	Temp
1: Sele... ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>
2: Sele... ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>
3: Sele... ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>
4: Sele... ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>

← Food Samples Taken →

1. To record a food sample, select an **Observation** from the drop-down menu.
2. Tap the Food Item field and enter the **Food Item**.
3. Enter the **Location** of the food item.
4. Enter the **Temperature**.
5. Click **Add**.

Smartforms

Survey Form

AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240109133933923

Food Samples Taken

Observations	Food Item	Location	Temperature
Cooling Time & Temp	Lettuce and tomatoes	Refrig # 1	44

Total # of items recorded: 1

Observations	Food Item	Location	Temp
1: Sel... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>
2: Sel... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>
3: Sel... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>
4: Sel... ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>

← **Food Samples Taken** →

The food sample is added to the Food Samples Taken section at the top of the page.

6. Repeat for any additional food samples.
- **NOTE:** Multiple food samples can be entered before clicking add.
7. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.8 Liquid Waste Sampling

Smartforms

Survey Form
AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240109133933923

Liquid Waste Sampling

Date of last EPA Sanitary Survey Phosphorous

BOD pH

Suspended Solids Flow Volume

Fecal Coliform Oil and Grease

Total Nitrogen Floatable Solids > Trace Amounts

Lab Used for Sample Analysis

Comments

← Liquid Waste Sampling →

The Liquid Waste Sampling page of the Survey Form allows the user to enter information about liquid waste collected during the survey.

1. Enter any known information about the sample including Date of last EPA Sanitary Survey, Phosphorous, BOD, pH, Suspended Solids, Flow Volume, Fecal Coliform, Oil and Grease, Total Nitrogen, Floatable Solids > Trace Amounts, or Lab Used for Sample Analysis.
2. Enter any comments in the **Comments** field.
3. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.9 Drinking Water Sampling

Smartforms

Survey Form
AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240109133933923

Drinking Water Sampling

Date of last EPA Sanitary Survey

Date of last CCR

Coliform

VOCs

HAA5 & TTHM

Disinfectant Residual

Lead & Copper

Turbidity

Arsenic

pH Level

Radionuclides

Fluoride Concentration

Inorganics

Other(s)

Nitrate

Lab Used for Sample Analysis

Comments

← Drinking Water Sampling →

The Drinking Water Sampling page of the Survey Form allows the user to enter information about drinking water samples collected during the survey.

1. Enter any known information about the sample including Date of last EPA Sanitary Survey, Date of last CCR, Coliform, VOCs, HAA5 & TTHM, Disinfectant Residual, Lead & Copper, Turbidity, Arsenic, pH Level, Radionuclides, Fluoride Concentration, Inorganics, Other(s), Nitrate, or Lab Used for Sample Analysis.
2. Enter any comments in the **Comments** field.
3. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.10 Introductory Comments

The Introductory Comments page of the Inspection form is used to select or enter any comments pertaining to the survey inspection.

Smartforms

Survey Form

AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240109133933923

Introductory Comments

Remaining: 4000

Inspection Images

Tap to annotate images

Attachments

Click the paper clip icon on the right side to add a new attachment.

Tap to attach files

Introductory Comments

1. Type any comments in the **Introductory Comments** text box field.
2. To add any images pertaining to the survey, tap the **Inspection Images** field.
3. To add any attachments, tap the **Attachments** icon.
4. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

5.11 Inspection Footer

The Inspection Footer is always the last page of any Survey form.

Smartforms

Survey Form
AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240109133933923

Time In: 13:39
Time Out: HH:mm

Now 1:39 PM

Next Survey Date: MM/dd/yyyy
Next Survey Purpose: Select an option

Total # of Deficiencies: 0
P or PF Deficiencies: 0
Repeat P or PF Deficiencies: 0

Score: _____

P/E/S/SS

Program: Select an option
Element: Select an option

Sub Element: Select an option
Sub-Sub Element: Select an option

10 Essential Services

10 Essential: Primary: Select an option
10 Essential: Secondary: Select an option

EHS and Signatures

Person In Charge Signature: Tap to sign
Person In Charge Print: _____

Inspector Signature: Tap to sign
EHS Inspector: Grady, John

Print Preview

← Survey Footer →

1. Review and/or update the **Time Out** by selecting a time, or use the **Now** button to enter the current time.
2. Use the calendar icon or manually enter **Next Survey Date**.
3. Use the drop-down to select **Next Survey Purpose**.
4. Use the drop-down to select a **Program**.
5. Use the drop-down to select an **Element**.

6. Have the person in charge tap to sign the **Person In Charge Signature** either using their finger or a stylus, and print their name.
7. Tap to sign the **Inspector Signature** and ensure that the correct EHS Inspector is populated in the drop-down.

The screenshot shows a mobile application window titled "Smartforms" with a "Survey Form" header. The form includes the following fields and sections:

- Time In:** 13:39 (with a refresh icon)
- Time Out:** 13:47 (with a refresh icon)
- Time Summary:** "Now 1:39 PM" and "Now 1:47 PM"
- Next Survey Date:** 07/09/2024 (with a calendar icon)
- Next Survey Purpose:** Routine (dropdown menu)
- Deficiency Summary:**
 - Total # of Deficiencies: 0
 - # P or PF Deficiencies: 0
 - # Repeat P or PF Deficiencies: 0
- Score:** A text input field with a horizontal line.
- P/E/S/SS Section:**
 - Program:** Environmental Health (dropdown)
 - Element:** Food Protection (dropdown)
 - Sub Element:** Select an option (dropdown)
 - Sub-Sub Element:** Select an option (dropdown)
- 10 Essential Services Section:**
 - 10 Essential: Primary:** Select an option (dropdown)
 - 10 Essential: Secondary:** Select an option (dropdown)
- EHS and Signatures Section:**
 - Person In Charge Signature:** Tap to edit signature (with a signature icon) and a signature image.
 - Person In Charge Print:** John Doe (text input)
 - Inspector Signature:** Tap to edit signature (with a signature icon) and a signature image.
 - EHS Inspector:** Grady, John (dropdown menu)

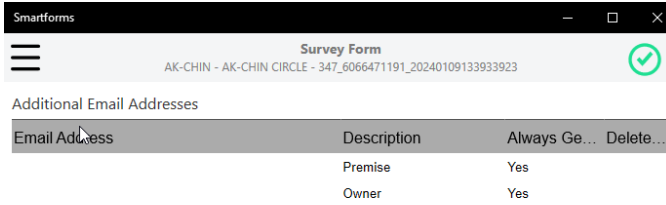
8. Optionally, to print the inspection, click **Print Preview**.

The screenshot displays a mobile application interface. At the top, there is a signature box containing a handwritten signature. Below this is a dark grey button labeled "Print Preview". A dark grey header bar contains the text "Email Options". Underneath, there are two radio button options: "Email Final Report to Establishment?" and "BCC yourself on the Email?". To the left of these options is a dark grey button labeled "Add/Change Email Addresses". Below the radio buttons, there is a text prompt "Select Email to add to below list" followed by a dropdown menu with the text "Select an option" and a downward arrow. To the right of the dropdown is a dark grey button labeled "Add selected email to the list below". Below these elements, there is a text prompt "A copy of this report will be sent to the following email addresses" and a sub-prompt "To remove an email address from this list, click the icon of a garbage can on that row." Below the prompts is a table with a single header row labeled "Email Address". The table body is currently empty. At the bottom of the screen, there is a dark teal navigation bar with several icons.

- 9. Select whether to email the final report to the establishment and BCC yourself on the email.
- 10. Select an **Email** from the drop-down menu or click the **Add/Change Email Addresses** button.

5.11.1 Add/Change Email Address

1. To add or change an email address, click **Add/Change Email Address**.



Either select an Email Address from above, or enter a new one in the fields below. Then you must click either the Add New or Update button to save the entry. Clear Entry Changes will just clear the screen fields with no changes.

Email Address Description Always Get Rpts Yes Delete Yes

File ID

[Return to the Footer Page](#)



2. Either select an existing email address from the list at the top of the page, or enter a new **Email Address** and **Description**.

Smartforms — □ ×

☰

Survey Form
AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240109133933923

✔

Additional Email Addresses

Email Address	Description	Always Ge...	Delete...
	Premise	Yes	
	Owner	Yes	

Either select an Email Address from above, or enter a new one in the fields below. Then you must click either the Add New or Update button to save the entry. Clear Entry Changes will just clear the screen fields with no changes.

Email Address

Description

 ×

Always Get Rpts

Yes

File ID

Add New

Clear Entry Changes

⤵

Return to the Footer Page

←

Email Addresses

3. Click **Add New**. Alternatively, if an existing email address was selected, click **Update**.
4. The added or updated email address will be saved and added to the list of additional email addresses at the top of the page.

Smartforms — □ ×

☰

Survey Form
AK-CHIN - AK-CHIN CIRCLE - 347_6066471191_20240109133933923

✔

Additional Email Addresses

Email Address	Description	Always Ge...	Delete...
	Premise	Yes	
	Owner	Yes	
testemail@cdpehs.com	Test Email		

Either select an Email Address from above, or enter a new one in the fields below. Then you must click either the Add New or Update button to save the entry. Clear Entry Changes will just clear the screen fields with no changes.

Email Address

Description

Always Get Rpts
 Yes

Delete
 Yes

File ID

Return to the Footer Page




5. Click **Return to the Footer Page** to leave the page and return to the Footer.
 6. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.
- NOTE:** Saving the session does not upload the session, but will save it until the user has internet access to upload to the database, or to review and verify at a later time. The saved inspection will appear on the Apps List under Survey Form.

5.12 Finish (Upload) Form

When the survey is complete with no missing required fields, a green checkmark appears in the top right of the Finish (Upload) Form page.

The screenshot shows a mobile application window titled "Smartforms" with a "Survey Form" header. Below the header, there is a table with columns: "Email Address", "Description", "Always Ge...", and "Delete...". A modal dialog box is displayed in the center with the text: "**FINISH SESSION** Are you sure you want to finish this session?". The dialog has two buttons: "No" and "Yes". Below the dialog, there is a text instruction: "Either select an Email Address from above, or enter a new one in the fields below. Then you must click either the Add New or Update button to save the entry. Clear Entry Changes will just clear the screen fields with no changes." Below this instruction are input fields for "Email Address", "Description", "Always Get Rpts" (with a radio button for "Yes"), and "File ID". A "Return to the Footer Page" button is also visible. At the bottom of the screen, there is a navigation bar with a back arrow and an "Email Addresses" button.

1. When ready to upload the completed form and finish the session, click **Finish This Session**.

 **NOTE:** Internet access is required to upload the completed form to the web system. A pop-up window will appear to confirm that the session will be finished.

A close-up of the confirmation dialog box from the screenshot. It contains the text: "**FINISH SESSION** Are you sure you want to finish this session?". Below the text are two buttons: "No" and "Yes".

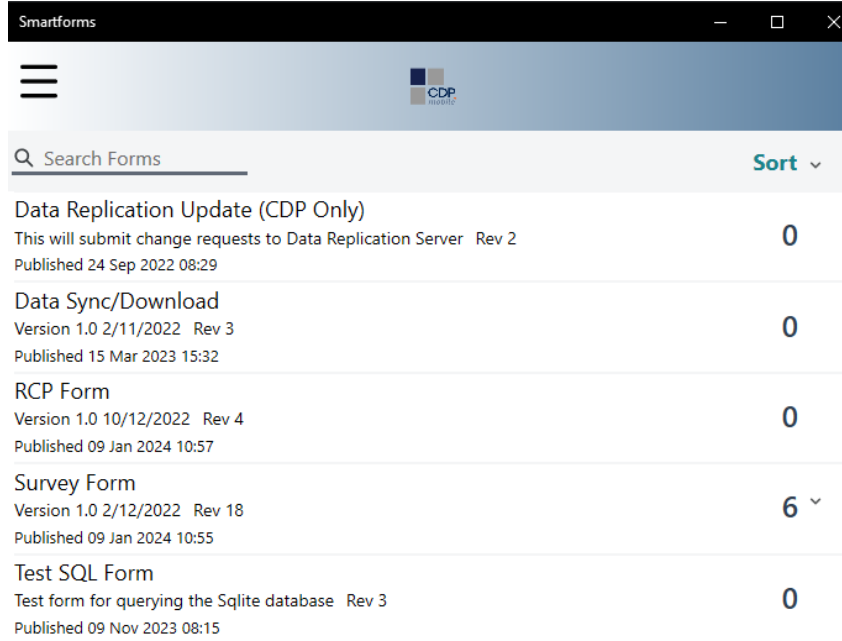
2. Click **Yes** to finish and upload the session to the database.

The survey form session will no longer display on the Apps List page. The session will be uploaded to the web system database and the emails (if selected) will be sent to the email addresses entered.

6 RCP Form

1. To access the RCP Form from the Apps List, click **RCP Form**.

You do not need to be connected to the internet to complete this form if Data Sync and Download were already performed.



The screenshot shows the Smartforms application interface. At the top, there is a search bar labeled "Search Forms" and a "Sort" dropdown menu. Below this is a list of forms with the following details:

Form Name	Version / Date	Revision	Count
Data Replication Update (CDP Only)	This will submit change requests to Data Replication Server	Rev 2	0
	Published 24 Sep 2022 08:29		
Data Sync/Download	Version 1.0 2/11/2022	Rev 3	0
	Published 15 Mar 2023 15:32		
RCP Form	Version 1.0 10/12/2022	Rev 4	0
	Published 09 Jan 2024 10:57		
Survey Form	Version 1.0 2/12/2022	Rev 18	6
	Published 09 Jan 2024 10:55		
Test SQL Form	Test form for querying the Sqlite database	Rev 3	0
	Published 09 Nov 2023 08:15		

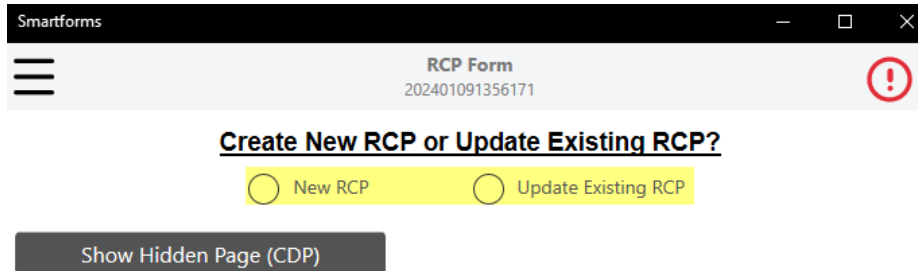


Last sync: 09 Jan 2024 13:55:47

The Create New or Update Existing RCP page will display.

6.1 Create New or Update Existing

The first page of the RCP form allows the user to select whether to create a new RCP or update an existing RCP.



The screenshot shows a mobile application interface for the RCP Form. At the top, there is a header bar with the text "Smartforms" on the left, a hamburger menu icon, and the title "RCP Form" with the ID "202401091356171" and a red warning icon on the right. Below the header, the main content area displays the question "Create New RCP or Update Existing RCP?" in bold. Underneath this question are two radio button options: "New RCP" (which is selected and highlighted in yellow) and "Update Existing RCP". At the bottom of the form, there is a dark grey button labeled "Show Hidden Page (CDP)".



1. To create a new RCP, select **New RCP**.
 - NOTE: To update an existing RCP, select Update Existing RCP, and refer to section [Demographics](#) to continue.

Smartforms

RCP Form
202401091356171

Create New RCP or Update Existing RCP?

New RCP Update Existing RCP

Service Unit (required)
Select an option


Community
Select an option

Tribe
Select an option

Reservation
Select an option

Show Hidden Page (CDP)

The page will expand to display selections for Service Unit, Community, Tribe, and Reservation.

2. Use the drop-down to select the **Service Unit**.
 3. After completing the required fields, use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.
-  **NOTE:** When creating a new RCP, the next page of the RCP form will be [RCP Information](#). The following section is for updating an existing RCP.

6.2 Demographics

When a user selects Update Existing RCP, the first page of the RCP form that displays is Demographics.

Smartforms

RCP Form
202401091356171

Optional Search Filters

Service Unit: PHOENIX
Community: Select an option
Tribe: Select an option
Reservation: Select an option
Establishment Type: Select an option

RCP Search
(Searches RCP Title and Premises Name) Search

R/C/P's
Tap here to see list (27 items)

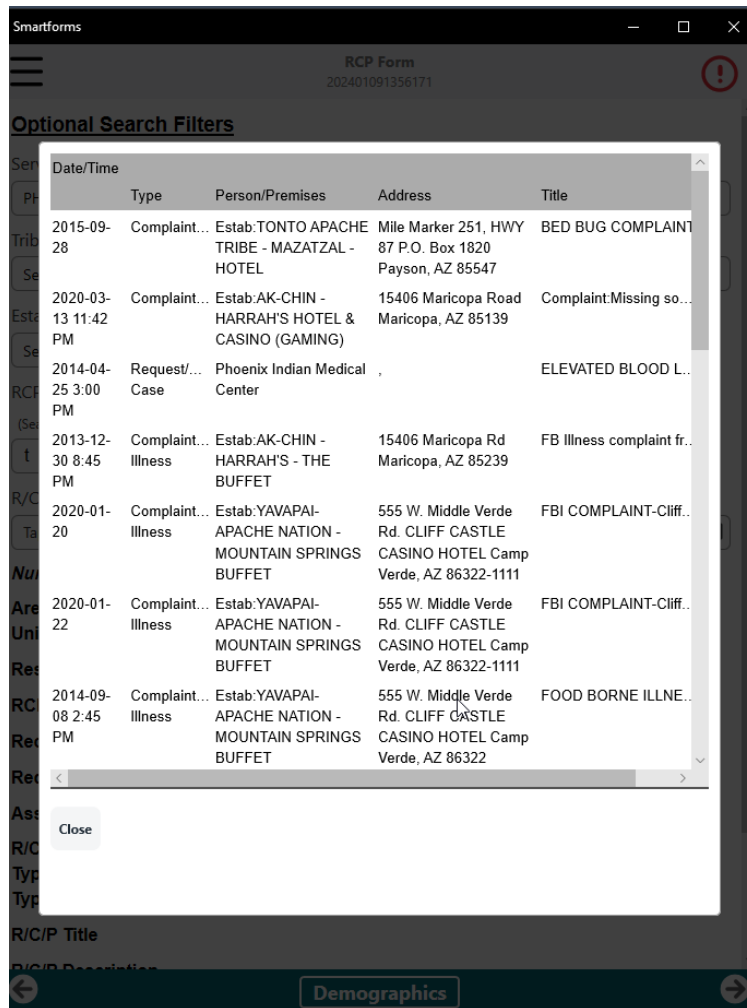
Number of R/C/P's found = 27. Updated at 13:59:58

Area/Service Unit/Community
Reservation/Tribe
RCP Number **RCP Date/Time**
Received By
Request Method
Assigned EHS
R/C/P Type/Supplemental Type
R/C/P Title
R/C/P Description

Demographics

1. Search for an RCP by entering an RCP Title or Premise Name in the **RCP Search** field, then clicking **Search**. To narrow down the list, the optional search filters at the top of the form can be used to select Establishment Type, Service Unit, Community, Tribe, or Reservation.

2. Tapping the grid icon in the **R/C/P's** field will display a more detailed list.



3. Tap on an RCP in the list to select it, then click **Close** to return the Demographics page.

The screenshot shows the 'RCP Form' interface. At the top, it displays 'RCP Form' and a specific complaint ID: 'FB Illness complaint from cust_12-30-2013_202401091356171'. Below this is a section for 'Optional Search Filters' with several dropdown menus for 'Service Unit' (set to PHOENIX), 'Community', 'Tribe', 'Reservation', and 'Establishment Type'. A search bar contains the letter 't' and a 'Search' button. Below the search bar, a list of results is shown, with one result selected: 'FB Illness complaint from customer'. This result is expanded to show details: Date/Time: 2013-12-30 8:45 PM, Type: Complaint/Foodborne Illness, Person/Premises: Estab:AK-CHIN - HARRAH'S - THE BUFFET, Address: 15406 Maricopa Rd Maricopa, AZ 85239, Title: FB Illness complaint from customer, and FileID: 223. Below the search results, a summary line states 'Number of R/C/P's found = 27. Updated at 14:02:28'. A table of demographics follows, listing Area/Service, Reservation/Tribe, RCP Number, Received By, and Request Method. At the bottom, there is a navigation bar with a back arrow, a 'Demographics' button, and a forward arrow.

Once an RCP has been selected, the RCP demographics information displays at the bottom of the screen. The available demographics information is based on the information loaded during the Data Sync and Download.

NOTE: When there is no data provided in a field it is due to no data being added on the web system. To populate that information in the future, the user would need to log in to the web system, enter the demographic information, then run the Data Sync and Download again.

4. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

6.3 RCP Information

The RCP Information page of the RCP form allows the user to view, add, or update information on the RCP. There are no required fields on the RCP Information page.

Smartforms RCP Form
FB Illness complaint from cust_12-30-2013_202401091356171

Establishment Search
(Searches Name, Address, Est Number, City) **Search**

Establishments
AK-CHIN - HARRAH'S - THE BUFFET

Establishment: AK-CHIN - HARRAH'S - THE BUFFET
Address: 15406 Maricopa Rd
CSZ: Maricopa , AZ 85239
Type: 47 Cafe/Restaurant
Est Number: 6066470900
Next Insp Date: 09/21/2022

Number of Establishments found = 1. Updated at 14:03:11

R/C/P Number Status Final

R/C/P Date R/C/P Time

Received By

Request Method Assigned EHS

R/C/P Type Supplemental Type

Title

Description

RCP Information

NOTE: The RCP Information page may require scrolling to view the entire page. The entirety of the page is shown on the following page.

Smartforms

RCP Form
FB Illness complaint from cust_12-30-2013_202401091356171

Location:

Person/Premise
AK-CHIN - HARRAH'S - THE BUFFET

Address
15406 Maricopa Rd

Address 2

City State ZIP
Maricopa AZ 85239-____

R/C/P Contact Information:

First Name Last Name
MiMi (see form)

Address

Address 2

City State ZIP

Primary Phone Ext Type
() - - Select an option

Primary Phone Name

Alternate Phone Ext Type
() - - Select an option

Alternate Phone Name

← RCP Information →

NOTE: Fields that are greyed out, such as the **Location** fields, cannot be edited.

6.4 RCP Findings

The RCP Findings page of the RCP form is used to document findings of the request or complaint.

Smartforms

RCP Form

FB Illness complaint from cust_12-30-2013_202401091356171

Initial Action Taken

Initial Action Taken By

MM/dd/yyyy

Findings

Complaint closed. No other complaints or related incidences.

Remaining: 3940

Referred To

Date Referred

MM/dd/yyyy

Date Closed

Notification

12/30/2013

Yes

No

R/C/P Images

Tap to annotate images

R/C/P Attachments

Click the paper clip icon on the right side to add a new attachment.

Tap to attach files

RCP Findings

There are no required fields on the RCP Findings page, but if there are findings to record, follow the steps below.

1. Select the **Initial Action Date**.
2. Enter the **Initial Action Taken By** person's name.
3. Enter a description of the **Findings**.

4. Enter the **Referred To** person’s name.
5. Enter the **Date Referred**.
6. Enter the **Date Closed** and select whether **Notification** was made.

Smartforms — □ ×

RCP Form ✔

FB Illness complaint from cust_12-30-2013_202401091356171

Initial Action Taken Initial Action Taken By

MM/dd/yyyy 📅

Findings

Complaint closed. No other complaints or related incidences.

This is a test complaint
This is only for demonstration purposes
This is part of the RCP Form tutorial document

Remaining: 3827

Referred To Date Referred

MM/dd/yyyy 📅

Date Closed Notification

12/30/2013 📅 Yes

No

R/C/P Images

Tap to annotate images 📷

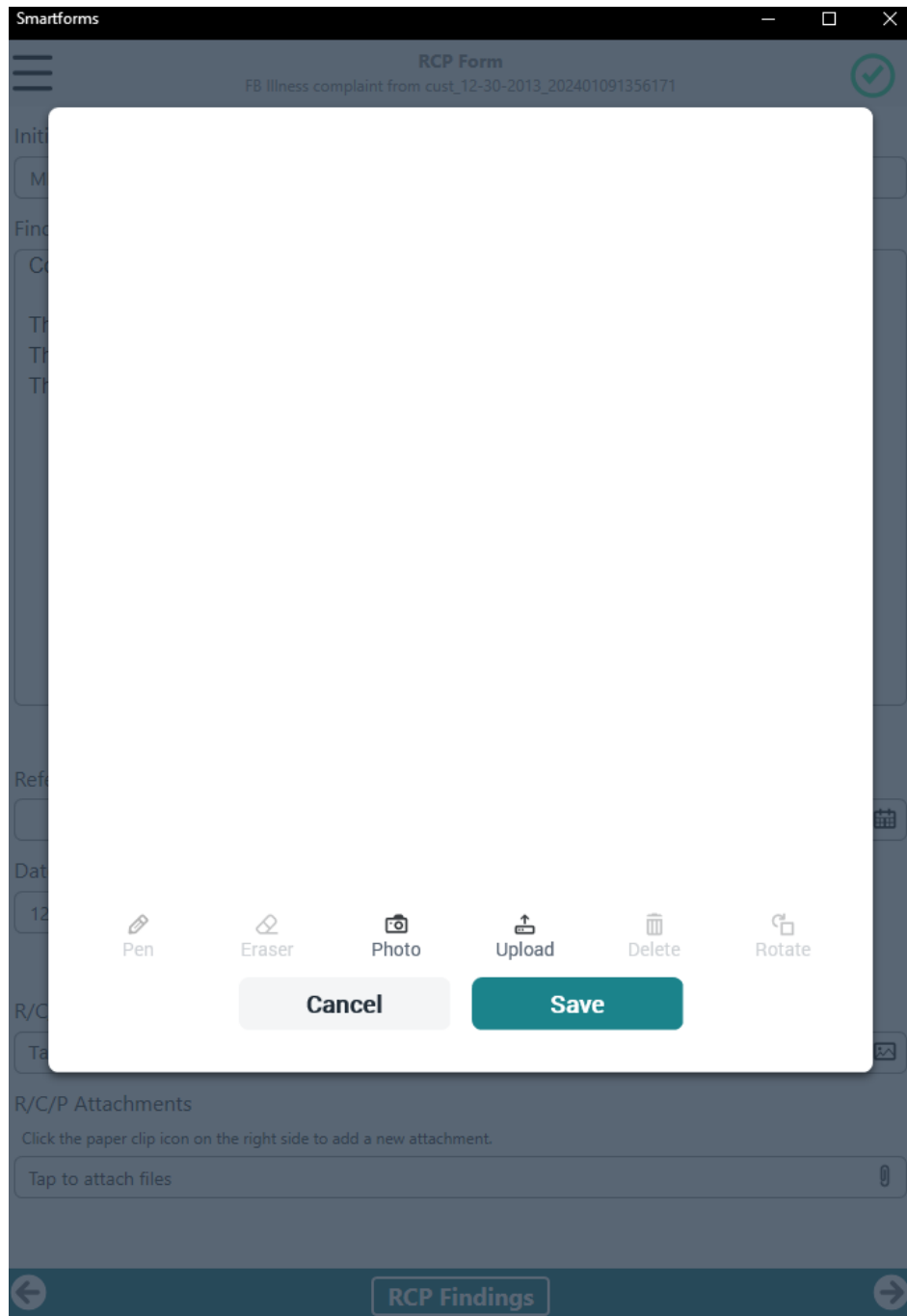
R/C/P Attachments

Click the paper clip icon on the right side to add a new attachment.

Tap to attach files 📎

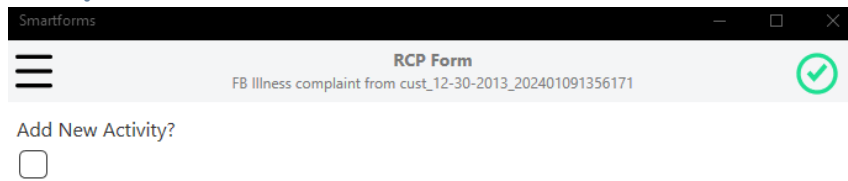
← RCP Findings →

7. To upload an **R/C/P image**, tap the image icon, then use the mobile device camera to take a photo or upload an existing photo. Click **Save**.



8. To upload an **R/C/P attachment**, click the paperclip icon, then select a file on the mobile device to attach.
9. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

6.5 Add Activity



The screenshot shows a mobile application window titled "Smartforms" with a close button. Below the title bar is a header area with a hamburger menu icon on the left, the text "RCP Form" in the center, and a green checkmark icon on the right. Underneath the header, the text "FB Illness complaint from cust_12-30-2013_202401091356171" is displayed. Below this, the text "Add New Activity?" is followed by an unchecked checkbox.



1. To add new activity to the RCP, tap to check the box under **Add New Activity**. The page will update with fields that only display when the new activity box is checked.

Smartforms

RCP Form
FB Illness complaint from cust_12-30-2013_202401091356171

Add New Activity?

Activity Date: MM/dd/yyyy

Activity Due Date: MM/dd/yyyy

Type: Select an option

Duration Hours:

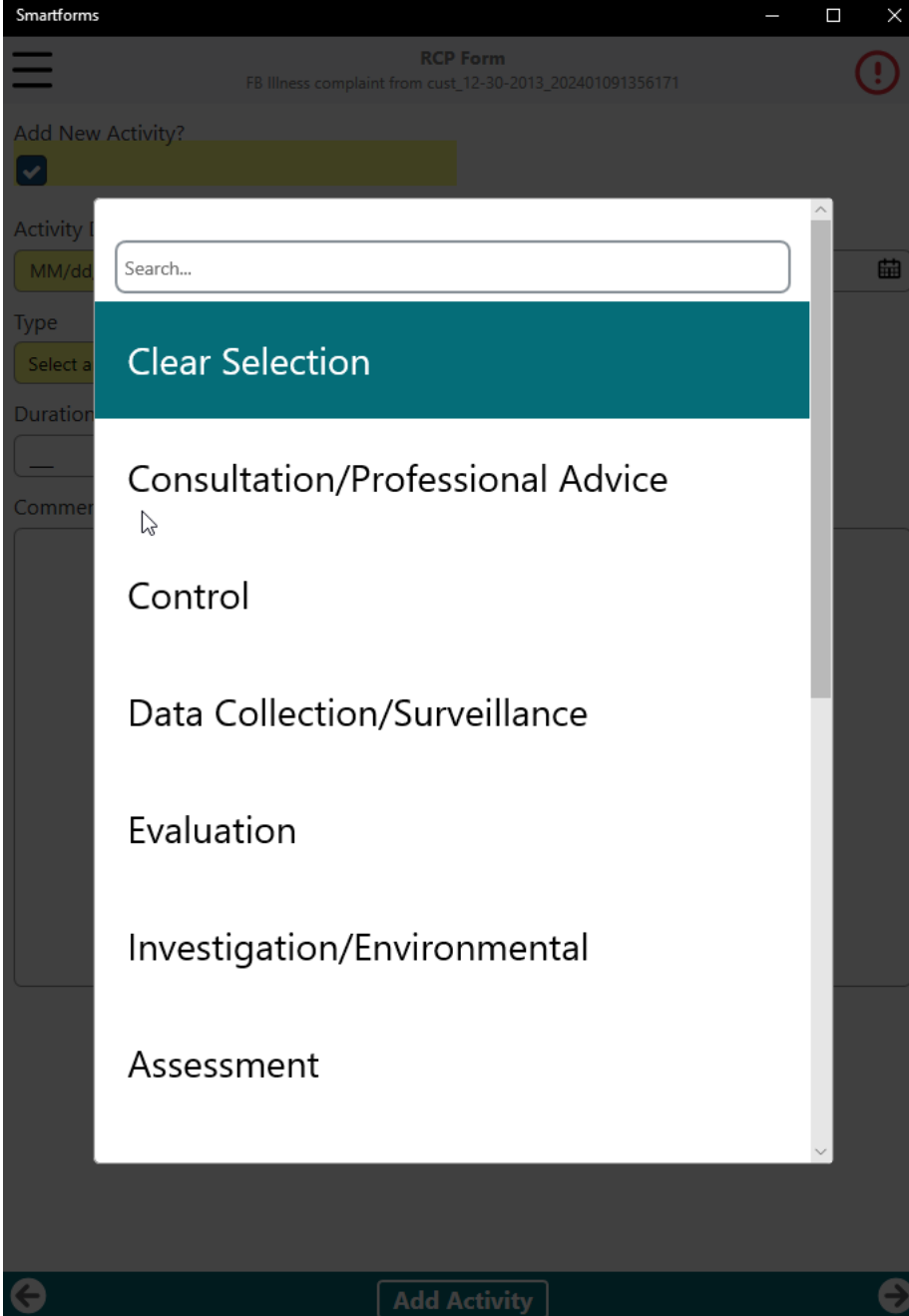
Duration Minutes:

Comments

Remaining: 4000



2. Select the **Activity Date** and optionally, select **Activity Due Date** using the calendar icon.
3. Select a **Type** from the drop-down menu.



The screenshot shows the Smartforms application interface for an RCP Form. The title bar indicates "RCP Form" and "FB illness complaint from cust_12-30-2013_202401091356171". A dropdown menu is open, displaying a search bar and a list of activity types: "Clear Selection", "Consultation/Professional Advice", "Control", "Data Collection/Surveillance", "Evaluation", "Investigation/Environmental", and "Assessment". The background form fields include "Add New Activity?", "Activity", "Type", "Duration", and "Comments". A blue "Add Activity" button is visible at the bottom.

4. Optionally, enter the Duration (Hours/Minutes).
5. Enter any comments in the **Comments** field.

Smartforms

RCP Form
FB Illness complaint from cust_12-30-2013_202401091356171

Add New Activity?

Activity Date: 01/09/2024
Activity Due Date: MM/dd/yyyy

Type: Evaluation

Duration Hours: _
Duration Minutes: _

Comments: Test evaluation|

Remaining: 3985



6. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

6.6 Activity Element Data Indicators

The Activity Element Data Indicators page of the RCP form allows the user to enter a variety of information pertaining to the RCP activity. There are no required fields on this page of the form.

The screenshot shows a mobile application window titled "Smartforms" with a sub-header "RCP Form" and a patient ID "FB Illness complaint from cust_12-30-2013_202401091356171". The form fields are as follows:

- Plan Review - Type of Facility:
- People Impacted:
- Confirmed Disease Rate (Hospital / ER / ED visit):
- Case Dx Verification:
- Agent or Disease (if not listed in sub-elem):
- Link to Specific Event or Source:
- Sample(s) Taken:
- Sample Results (Numeric Value):
- Sample Results from what Food Type:
- Physician / PCP Referral:
- Infection Control Measure (e.g., handwashing, vehicle disinfection, etc.):
- Individuals Trained:

At the bottom, there is a teal navigation bar with a back arrow, the text "Activity Element Data Indicators", and a forward arrow.

NOTE: Scroll on the mobile device to view the Activity Element Data Indicators page in its entirety.

Smartforms

RCP Form

FB Illness complaint from cust_12-30-2013_202401091356171

Sample(s) Taken

Sample Results (Numeric Value)

Sample Results from what Food Type

Physician / PCP Referral

Select an option

Infection Control Measure (e.g., handwashing, vehicle disinfection, etc.)

Individuals Trained

Individuals Certified

Level of Certification (e.g., Level or Name / Description of Training, etc.)

Name of Project / Study

Partners

Cost of Study

Funding Agency or Entity

Activity Element Data Indicators

1. Enter any known information in the optional fields.
2. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

6.7 RCP Footer

The RCP Footer is the final page of the RCP form.

Smartforms

RCP Form
FB Illness complaint from cust_12-30-2013_202401091356171

P/E/S/SS

Program
Environmental Health

Element
Food Protection

Sub Element
Select an option

Sub-Sub Element
Select an option

10 Essential Services

10 Essential: Primary
Select an option

10 Essential: Secondary
Select an option

EHS and Signatures

Inspector Signature
Tap to sign

EHS Inspector
Grady, John

Print Preview

Email Options

Add/Change Email Addresses

Email Final Report?

BCC yourself on the Email?

Select Email to add to below list
Select an option

Add selected email to the list below

A copy of this report will be sent to the following email addresses
To remove an email address from this list, click the icon of a garbage can on that row.

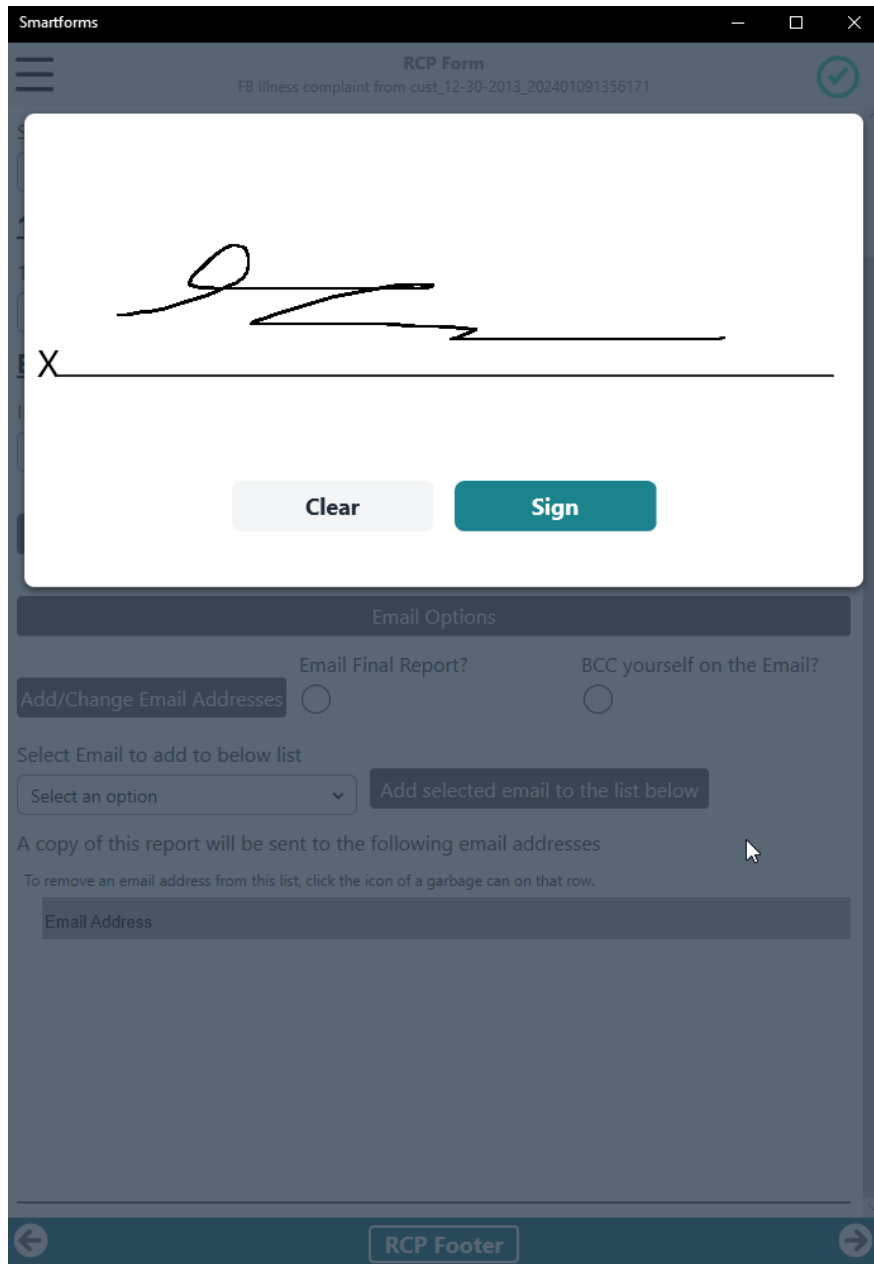
Email Address

RCP Footer

1. Ensure that the correct **Program**, **Element**, and **Sub Element** (if any) are selected.
2. If any of the **10 Essential Services** should be selected, use the drop-down menus.
3. Tap the pen icon to sign the **Inspector Signature**.

A pop-up window displays.

4. Use your finger or a stylus to sign.



5. Click **Sign** to accept the signature, or **Clear** to clear the signature and sign again.

- 6. Select the **EHS Inspector** from the drop-down menu.

The screenshot displays the 'RCP Form' interface on a mobile device. At the top, the title 'RCP Form' and a patient ID 'FB Illness complaint from cust_12-30-2013_202401091356171' are visible. Below the title are two dropdown menus for 'Sub Element' and 'Sub-Sub Element', both currently set to 'Select an option'. A section titled '10 Essential Services' contains two more dropdown menus for '10 Essential: Primary' and '10 Essential: Secondary', also set to 'Select an option'. The 'EHS and Signatures' section features a signature field with a 'Tap to edit signature' prompt and a trash icon, a signature image, and an 'EHS Inspector' dropdown menu currently showing 'Grady, John'. A 'Print Preview' button is located below the signature field. An 'Email Options' section includes a dark bar with the text 'Email Options', an 'Add/Change Email Addresses' button, and two radio buttons for 'Email Final Report?' and 'BCC yourself on the Email?'. Below this is a 'Select Email to add to below list' dropdown menu and an 'Add selected email to the list below' button. A note states 'A copy of this report will be sent to the following email addresses' and 'To remove an email address from this list, click the icon of a garbage can on that row.' Below the note is a table with one row containing the text 'Email Address' in a greyed-out box. The bottom of the screen features a dark teal navigation bar with a back arrow, 'RCP Footer', and a forward arrow.

Print Preview

Email Options

Add/Change Email Addresses Email Final Report? BCC yourself on the Email?

Select Email to add to below list

Select an option

A copy of this report will be sent to the following email addresses


To remove an email address from this list, click the icon of a garbage can on that row.

Email Address

← RCP Footer →

7. To view and print the RCP, click **Print Preview**.

All of the information entered for the RCP will be compiled into a printable form and can be saved to the mobile device.



 **Indian Health Service**
REQUEST FOR SERVICE

Date/Time: 09/19/2019 10:30 **Received By:** Zachary Hargis **Status:** Final

Area: PHOENIX **Service Unit:** COLORADO RIVER **Community:** PARKER

Reservation: COLORADO RIVER **Tribe:** COLORADO RIVER INDIANS, AZ AND CA

Request Method: **R/C/P Type:** Complaint

Supplement R/C/P Type: Foodborne Illness **R/C/P Title:** FBI Report

R/C/P Description:
Reported FBI complaint received by La Paz County Health Department and submitted via email to CRSU OEHE. Follow-up inspection of Safeway Deli conducted on 9/19/19.

Deli Manager: Kim Sanders
Store Manager: Steve Parsons

Location:
Person/Premise: CRIT - SAFEWAY DELICATESSEN
Location: 121 Riverside Drive, Parker, AZ 85344

R/C/P Contact Information (Requestor, Complainant or Project Contact):
Conditions:
Suspected FBI from under-cooked rotisserie chicken obtained at Safeway Deli on 9/16/19.

Owner or Occupant Involved:
Person:
Location: 121 Riverside Drive, Parker, AZ 85344
Primary Phone: **Alternate Phone:**

Initial Action:
Init Act Taken Date: 09/19/2019 **Init Act Taken By:** Zachary Hargis

Findings for R/C/P:
FBI Complaint Form completed to gather information about the complainant and food history. Reported eating under-cooked rotisserie chicken obtained at Safeway Deli on 9/16/19 at 12:00PM and waking to nausea, vomiting, and diarrhea at 4:00AM the following morning. No other suspected foods in 36-hour food history.

Follow up inspection of Safeway Deli conducted on 9/19/19 to observe the following items:
 All cooking temperature logs kept for each batch of chicken cooked in deli.
 All >165° F final cooking temperatures
 Thermometers were calibrated on site to determine accuracy and are within range
 No hot holding or cold holding abuses observed.

Referred To: **Date:**

Date Closed:

Notified Requester: **EHS**

Activity Information:

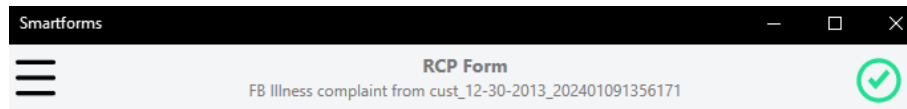
8. In the Email Options at the bottom of the page, select whether to **Email Final Report** and **BCC yourself on the Email**.
9. Click **Add/Change Email Addresses** to add an email address.
10. Use the drop-down to select an email address, then click **Add selected email to the list below**.

The email address(es) will be added to the bottom of the page.

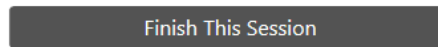
11. Use the navigation menu at the bottom of the page or the page navigation arrow to go to the next page of the form.

6.8 Finish (Upload) Form

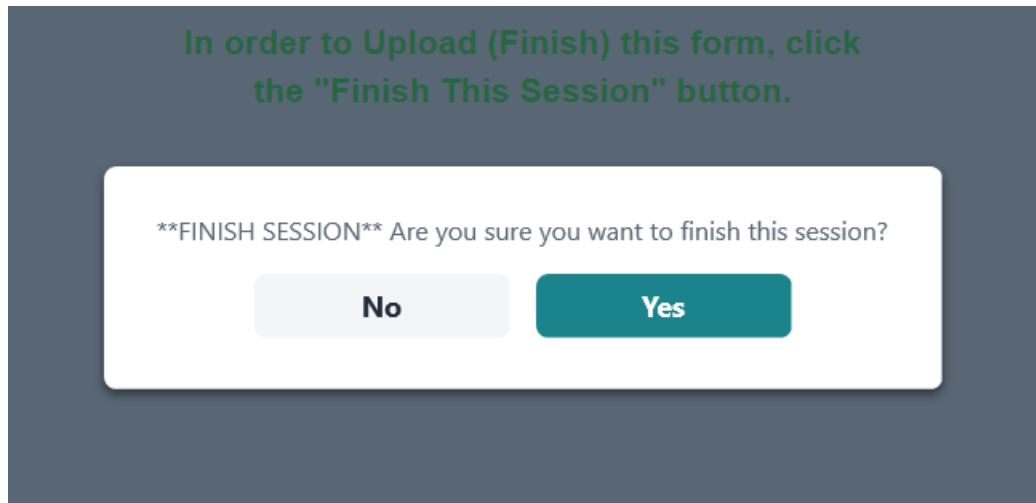
When the RCP form is complete with no missing required fields, a green check mark appears in the top right of the Finish (Upload) Form page.



In order to Upload (Finish) this form, click the "Finish This Session" button.



1. When ready to upload the completed form and finish the session, click **Finish This Session**. A pop-up window will appear to confirm that the session will be finished.

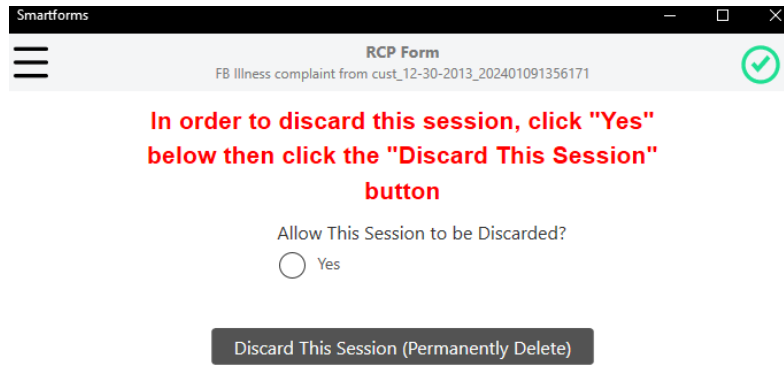


2. Click **Yes** to finish and upload the session to the database.

The inspection form session will no longer display on the Apps List page. The session will be uploaded to the web system database and the emails (if selected) will be sent to the email addresses entered.

6.9 Discard Session

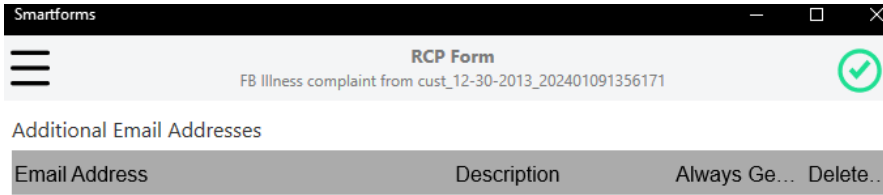
If for any reason the RCP session should be discarded, the Discard Session page of the form allows the user to permanently delete the current session.



1. To discard/permanently delete the session, click **Yes**.
A pop-up window will appear to confirm that the session will be discarded.

6.10 Email Addresses

The Email Addresses page of the form allows the user to enter additional email addresses.



Either select an Email Address from above, or enter a new one in the fields below. Then you must click either the Add New or Update button to save the entry. Clear Entry Changes will just clear the screen fields with no changes.

Email Address	Description	Always Get Rpts	Delete
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes	<input type="radio"/> Yes
		File ID	

Return to the Footer Page



1. To add a new email address, enter the **Email Address**.
2. Enter a **Description** for the email address.
3. Select whether to **Always Get Receipts**.
4. Select whether to **Delete**.

After a new email address is entered, an **Add New** button will display on the page.

5. Click **Add New** to add the email address to the list at the top of the page. Optionally, return to the Footer page by clicking **Return to the Footer Page**.