



WebEHRS User Guide



Division of Environmental Health Services (DEHS)

Version 4.1

February 4, 2026



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DOCUMENT INFORMATION

DOCUMENT HISTORY

Version	Date Effective	Details
1.0	January 6, 2012	Draft Document
2.0	April 3, 2013	Update Document to eliminate “Draft” verbiage
2.1	May 19, 2017	Reviewed Establishments module and updated screenshots/text based on system updates.
2.2	June 30, 2017	Reviewed R/C/P, National Projects, Activities, Reference modules and updated based on system changes. Removed Appendix D
2.3	December 1, 2017	
3.0	January 20, 2023	<p>Updated My Pending Surveys section to add activities due and a detailed view of the calendar.</p> <p>Some updates were made to some reports to include a new Titles filter. The reports impacted are reports 2a,2b,2c,2d,2e,8a,11,20a,22a,22.</p> <p>Updated Establishments section to include adding Additional Email functionality. Added “Check here if same as parent” function to link child to parent facilities.</p> <p>Updated the Add and Edit Survey sections with new, condensed, Deficiencies panel instead of separate page. Labels for “Critical” field have been changed to “P or PF”. New search filters “A1, A2, District, and Risk” were added. A new Save/Finalized and Add Attachment button was added.</p> <p>Updated the RCP section to include new Add Activity Master panel.</p>
4.0	May 16, 2024	Added section under Surveys for new Deficiency Search feature
4.1	February 4, 2026	Update Establishment section to include pool venue functionality. Update Survey section to include pool venue functionality.

1 INTRODUCTION

1.1 OVERVIEW

In 2012, the Indian Health Service (IHS) Division of Environmental Health Services (DEHS) implemented a new web-based system to support its environmental health services programs. The new system, Web-based Environmental Health Reporting System (WebEHRS) supports the 12 Areas and headquarters of DEHS and provides system end user functionality as well as administration and support functionality. This User Guide provides instructions and reference materials to users for each of the system modules.

1.2 BACKGROUND

This system replaces the previous DEHS-developed data system, also known as WebEHRS. WebEHRS was developed by Custom Data Processing, Incorporated (CDP) in conjunction with IHS using the CDP commercial off-the-shelf (COTS) software and customized to meet the IHS user needs. Acronyms and definitions included in this Guide and in WebEHRS are provided in Appendix A.

1.3 SUPPORT

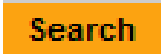










Support for WebEHRS is provided by both DEHS and CDP Customer Support.








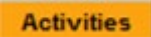




WebEHRS – Customer Support

Technical Assistance for:	Who to contact for assistance?
<ul style="list-style-type: none"> Acquire a new user account Change an existing user account 	Area DEHS Division Director
<ul style="list-style-type: none"> First-time log--in help System errors “How-Tos” 	CDP Customer Support 1-866-237-4814 customersupport@cdpehs.com
<ul style="list-style-type: none"> Missing features/wrong business rules 	WebEHRS apFeedback Report
<ul style="list-style-type: none"> EH/IEH/IP Policy Questions 	Area EH/IEH/IP Contact

1.4 COMMON BUTTONS AND ICONS

WebEHRS uses a common set of buttons and icons to provide a consistent user interface. These buttons and icons are defined below.

Common Buttons and Icons		
Title	Button/Icon Graphic	Description
Search button		<i>Left Click one time to apply all Search Criteria and return results from the database.</i>
Clear button		<i>Left Click one time to clear all Search Criteria and Search Results.</i>
Add New Record button		<i>Left Click one time to add a new record.</i>
Edit Record icon		<i>Left Click on the icon to edit the existing record.</i>
Copy Record button		<i>Left Click on the button to add a new record by copying all of the demographics from an existing record.</i>
Show/View Record icon		<i>Left Click on the icon to view the existing record.</i>
Checkbox		<i>Left Click in the box to select the record before proceeding to the next function.</i>
Drop Down List		<i>Left Click to view a list of all appropriate values that can be selected for that field.</i>
Save		<i>Left Click on the icon to save edits.</i>
Print		<i>Printer Icon</i>
Expand		<i>Left Click to expand Window.</i>

Common Buttons and Icons		
Title	Button/Icon Graphic	Description
Collapse		<i>Left Click to collapse Window.</i>
Documents		<i>Documents exist in DMS for the record in the row. Left Click to view to documents.</i>
Scan		<i>Scan in/import document for the record in the row.</i>
Refresh icon		<i>Left Click one time to refresh the page with any modified Search Criteria.</i>
Reset Filters icon		<i>Left Click one time to clear all Search Criteria.</i>
Lookup Link icon	Lookup	<i>Left Click to open a new window to search for a specific record.</i>
More Selections icon		<i>Left Click one time to open an additional search window with more Search Criteria and options.</i>
Reports/Complaints/Projects icon		<i>Left Click to access Reports, Complaints, and Projects (R/C/P).</i>
Activities icon		<i>Left Click to access Activities.</i>
Export Buttons & Icons		
PDF icon		<i>Left Click one time to export the results into a PDF report.</i>
MS Excel icon		<i>Left Click one time to export the results into a MS Excel file/report.</i>
MS Word icon		<i>Left Click one time to export the results into a MS Word file/report.</i>
CSV icon		<i>Left Click one time to export the results into a CSV file (sometimes referred to as</i>

Common Buttons and Icons		
Title	Button/Icon Graphic	Description
		"Common Delimited File").
Search and Pagination Buttons		
<p>When a search page results in multiple records being found, it may also result in the data being displayed in groups, or pages. The image below will be present on all search pages and allows you to:</p> <ol style="list-style-type: none"> 1. Navigate from page to page 2. Proceed immediately to the last page 3. Go back immediately to the first page 4. Change the number of items shown per page 		
Calendar Buttons		
Calendar icon		<i>Left Click one time to open the Calendar display.</i>
Calendar Display		<i>Left Click one time on a date to select it.</i> <i>Left Click on the arrows to navigate backward/forward in Months/Years.</i>

2 NEW USER

2.1 ACCOUNT

When a new user is created, an automated email message is sent to the new user via the email address that is stored in the user profile. The email will come from: WebEHS.Admin@ihs.gov.

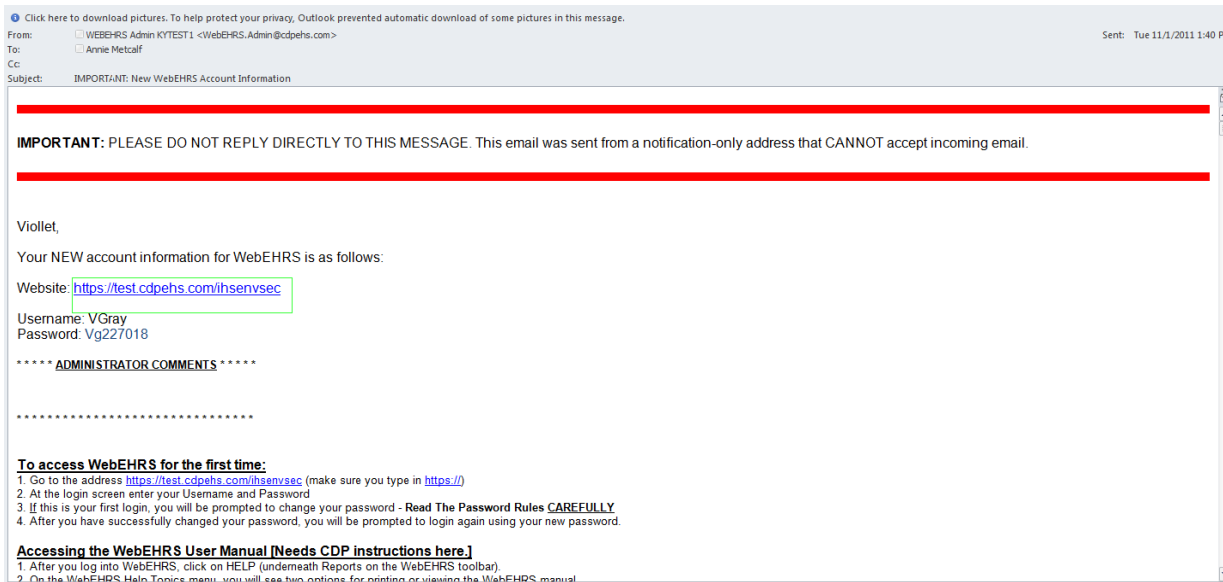
The email will include the User Name, Temporary Password, instructions for accessing the system and User Manual. The email will also include information about the user’s permissions and restrictions.

Users should review this information carefully before login to WebEHRS.

Note: Depending on the user’s privileges and setting, the email can be very long. Caution should be used in printing the email. Users should review the email before printing or copy the portion of the email with the desired information into a separate document or email.

To access the system for the first time, go to the link provided in new user account email.

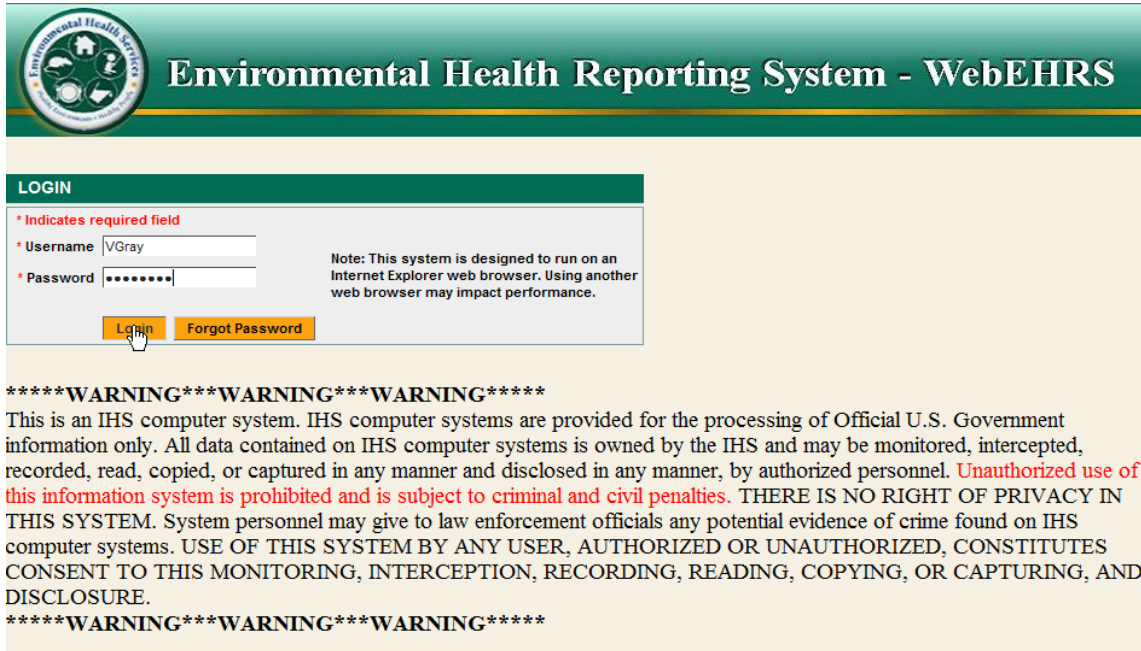
1. Click on the link provided in the email or go to the link <https://portal.cdpehs.com/ihsenvsec>.



2.2 LOGIN

The link should take the user to a new Login Screen.

1. Enter the User Name and Password as provided in the new account email.
2. Click on the Login button.



Before Login, the User should carefully review the Warning about the use of this system.

If this is the first login, the user will be prompted to change the temporary password.
Note: The user should review the password rules CAREFULLY.

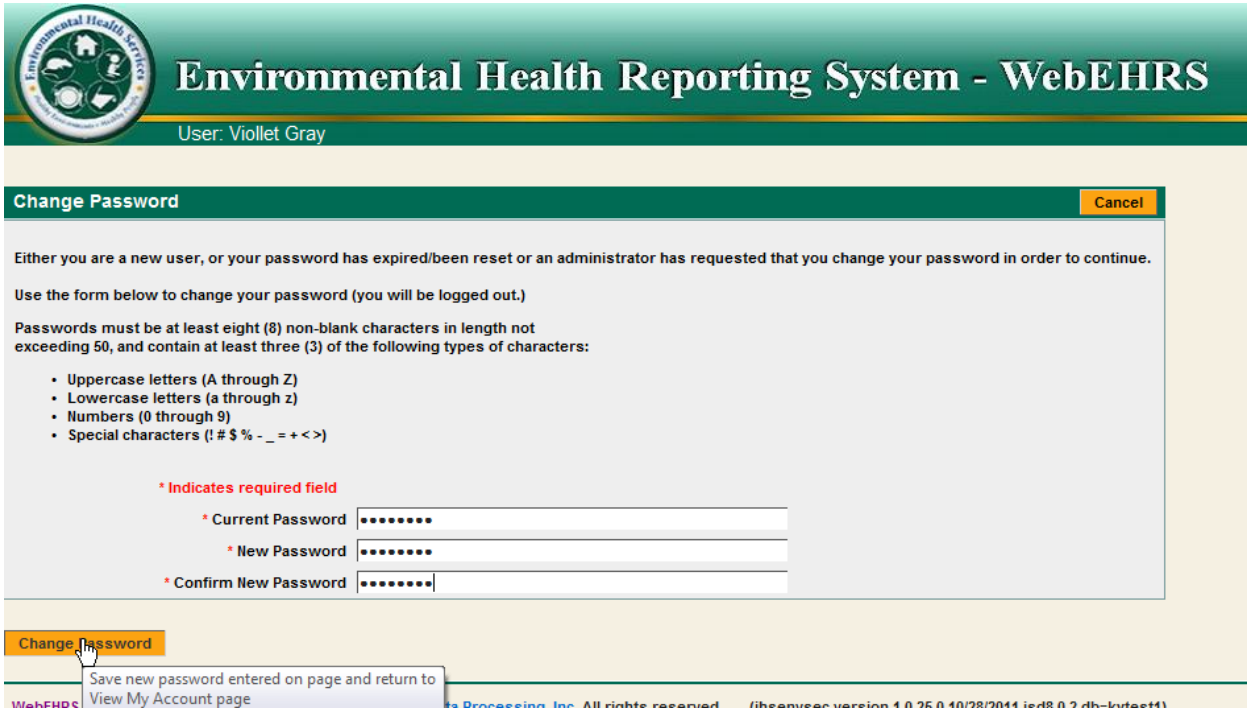
2.3 CHANGE TEMPORARY PASSWORD

Passwords must be at least eight (8) non-blank characters in length not exceeding 50, and contain at least three (3) of the following types of characters:

- Uppercase letters (A through Z)
- Lowercase letters (a through z)
- Numbers (0 through 9)
- Special characters (! # \$ % - _ = + < >)

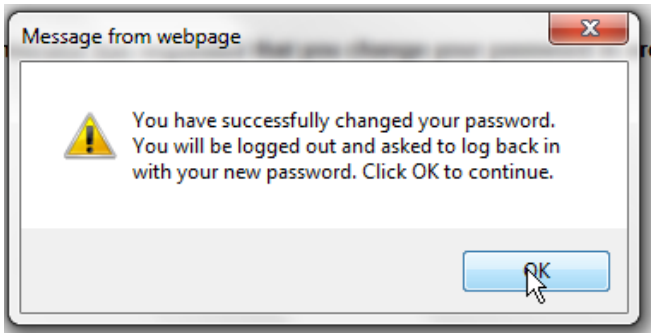
To change the password:

1. Enter the Current Password.
2. Enter the New Password.
3. Enter New Password in Confirm New Password.
4. Save New Password.



A new message window will appear to confirm that the password has been changed.

5. Click on the OK button.



The user will be logged out and asked to log back in with the new password. A new login window will appear for the user to login or the user can close the window and login at another time.

2.4 PERMISSIONS

User permissions will be determined by the Area DEHS designated users that have rights to set user permissions. Permissions will determine privileges for the user for functionality as well as data that can be accessed.

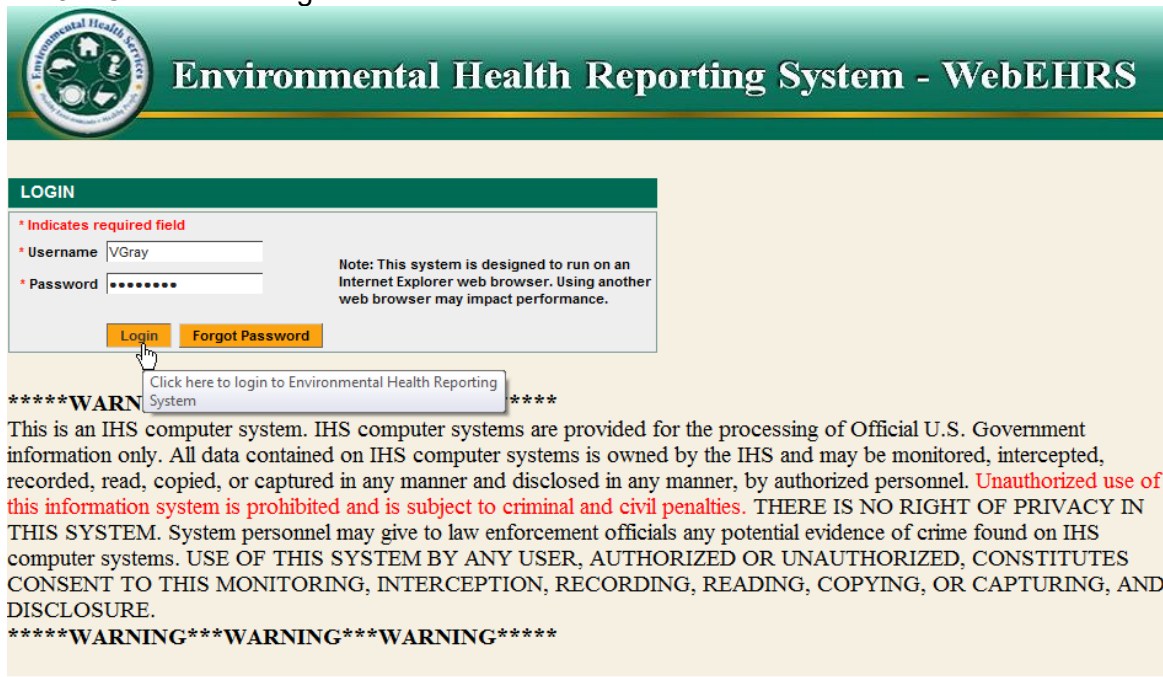
If you believe that you should have different permissions than those assigned, please contact your Area DEHS Division Director.

3 LOGIN

After the user changes a temporary password, the user will use the normal login process using an icon or shortcut setup to access WebEHRS. Follow the link to the login page.

To Login:

1. Enter Username.
2. Enter Password.
3. Click on the Login button.



3.1 FORGOT PASSWORD

If the password is forgotten, it can be reset using the Forgot Password on the Login screen.



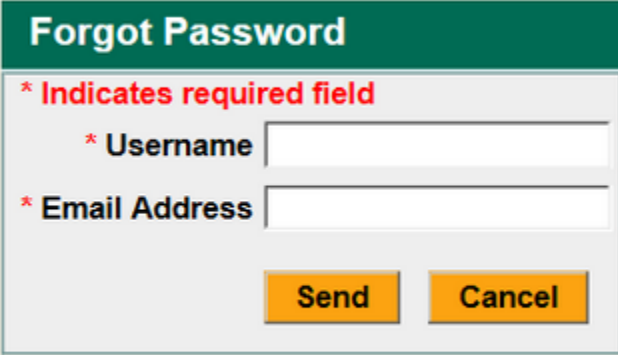
1. Click on the Forgot Password button.

A new window will appear. To request a new password:

2. Enter Username.
3. Enter Email Address.
4. Click on the Send button.

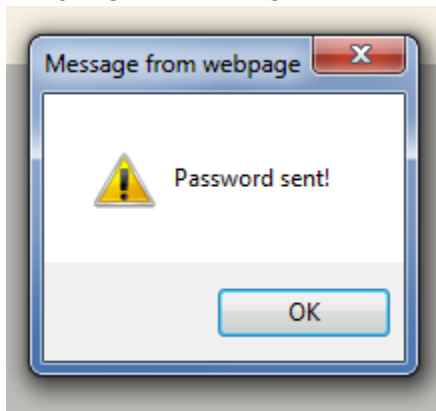
If the user remembers the Password, cancel by:

5. Click on the Cancel button.



If the user clicks on the Send button, a pop-up message will notify the user that a new Password has been sent via email.

6. Click on the OK button to close the window.



Note: The Email Address entered on the Forgot Password screen must match the email address value that is on the user account.

3.2 INVALID USER NAME OR EMAIL

If the email address does not match the email on the user account, the system will display a message indicating that the Username or Email Address was invalid:

1. Click on the Cancel button.

Or

1. Enter valid Username and Email Address.
2. Click on the Send button.

Forgot Password

*** Indicates required field**

* Username

* Email Address

Invalid Username or Email Address. Please try again or contact CDP Customer Support for assistance.

3.3 NOTIFICATION FORGOT PASSWORD

The user will receive an email with username and a temporary password. The user can then use the temporary password to login.

Note: The user will need to login and change his/her temporary password; similar to changing the temporary password for a new user account.



IMPORTANT: PLEASE DO NOT REPLY DIRECTLY TO THIS MESSAGE. This email was sent from a notification-only address that CANNOT accept incoming email.



Charlie,

This message was sent to you in response to a request for a WebEHRS password reset.

Your Username is: [CBrown](#)

Your TEMPORARY Password is: [Cb294000](#)

(NOTE: If you did not request a password reset, please notify the WebEHRS Help Desk immediately.)

You will be required to change your Temporary password when you log into the system.

=====
 Changing your Password when logged into WebEHRS
 =====

1. [Login to WebEHRS using your username and temporary password.](#)
2. Once you are logged in, click on the Tables link on the WebEHRS menu bar.
3. Click on the Change My Password link under the "User Functions" header.
4. Follow the instructions. Don't forget your new password!

Please contact the WebEHRS Help Desk at the email address below if you have any issues logging in.

Thank you,

WebEHRS System Administrator

3.4 PROBLEMS WITH LOGIN

If the user encounters problems with logging into WebEHRS, the user should contact CDP Customer Support found in Section 1.3, Support.

3.5 LOGIN FAILURE NOTIFICATION

If the user enters an incorrect Username and Password combination, WebEHRS notifies the user with a new login screen with a message indicating:

Invalid Username/Password combination.

LOGIN

Invalid Username/Password combination

* Indicates required field

* Username

* Password

Note: This system is designed to run on an Internet Explorer web browser. Using another web browser may impact performance.

The user can try to login again or use the Forgot Password feature.

3.6 LOGIN WHEN DID NOT LOGOUT

If a user does not logout and tries to log back in, WebEHRS displays a screen with options to continue with login in or not to continue to login.

LOGIN

* Indicates required field

* Username

You are already logged on to WebEHRS on another computer. Opening WebEHRS on this computer might cause you to lose unsaved information on the other computer. Do you want to continue logging in?

Note: This system is designed to run on an Internet Explorer web browser. Using another web browser may impact performance.

(NOTE: This is most likely because you did not logout last time. Please use the logout button instead of just closing the browser. When you use the logout button it helps WebEHRS close out your account properly. If you have not logged onto WebEHRS recently, please notify your local Help Desk.)

If the user chooses Yes, the user is automatically logged in to the Main Menu. If the user chooses No, the screen defaults to the login screen.

3.7 MULTIPLE FAILED LOGIN ATTEMPTS

WebEHRS enforces a limit of six (6) consecutive failed login attempts with the same username and will automatically "lock-out" the account for 1 minute. When the user executes the 6th consecutive failed attempt (and each subsequent attempt within the one minute time frame), WebEHRS displays the following message on the web page:

"You have exceeded the number of failed login attempts. Please wait one minute and try again. If you need assistance please contact your Area WebEHRS Representative or CDP Customer Support."

Subject: WebEHRS Warning – Notice of Failed Logins

From: WebEHRS System Administrator

Sent: Tuesday, April 19, 2011 9:49 AM

To: Buck, Nancy (IHS/HQ)

IMPORTANT: PLEASE DO NOT REPLY DIRECTLY TO THIS MESSAGE. This email was sent from a notification-only address that CANNOT accept incoming email.

Nancy,

This message was sent to you because you have had six (6) consecutive failed login attempts.

IMPORTANT: If you are not attempting to login to WebEHRS and believe that there may be a security issue, please contact your Area/Tribal Information System Security Officer and the CDP Help Desk immediately.

This notification is a component of the security requirements of the Department of Health and Human Services as outlined in the Information Security Program Handbook, Section 5.2.1.

Thank you,

WebEHRS System Administrator

customersupport@cdpehs.com

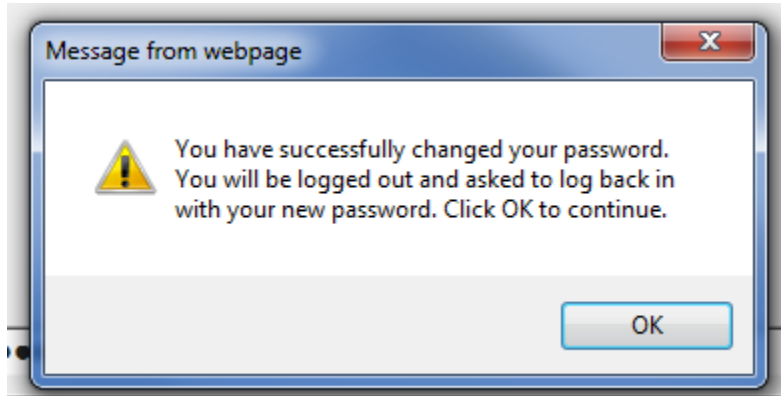
1-800-888-6035

When the 6th consecutive failed login attempt occurs, WebEHRS sends an auto-generated email to the email address on the user account notifying that user of the failed login attempts.

After several failed login attempts (less than 6 consecutive attempts), if a successful login is completed, the counter resets.

3.8 EXPIRED PASSWORD

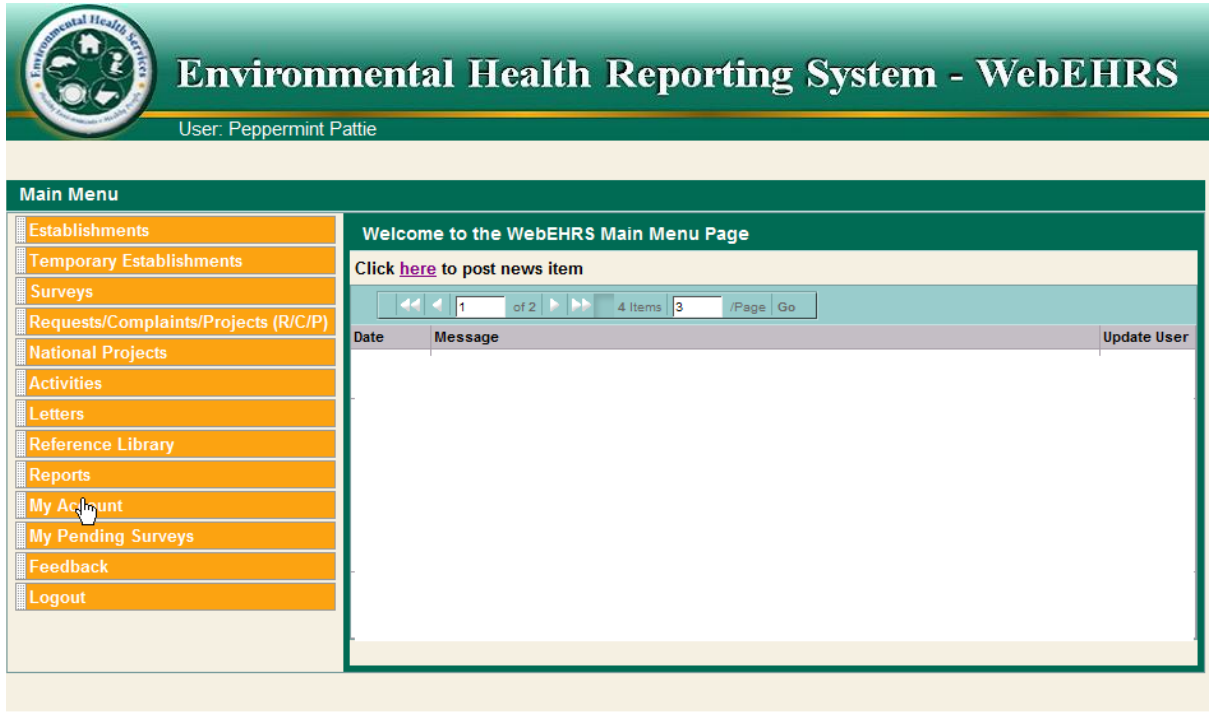
Users are required to change passwords at least once every 90 days. If a user does not change his/her password, attempting to login will result in an error message. WebEHRS directs the user to the Change Password screen and forces a password change before the user can access WebEHRS. A successful password change results in a pop-up message notifying the user to log back in with the new password: "You have successfully changed your password. You will be logged out and asked to log back in with your new password. Click OK to continue."



4 MAIN MENU

After completing a successful Login, the user is directed to the Main Menu. The user name always appears in the Banner at the top of the window for the Main Menu and all other modules.

The Main Menu also includes a Message window and series of links to each of the application Modules on the left portion of the Main Menu. The user clicks on any of the Main Menu items to navigate to a particular Module.



The Message window displays messages that are posted by authorized users including the date, message, and the user that posted or updated the message.

The users may also navigate using the forward and back arrows to scroll the list of messages and to change the number of items listed in the message window.

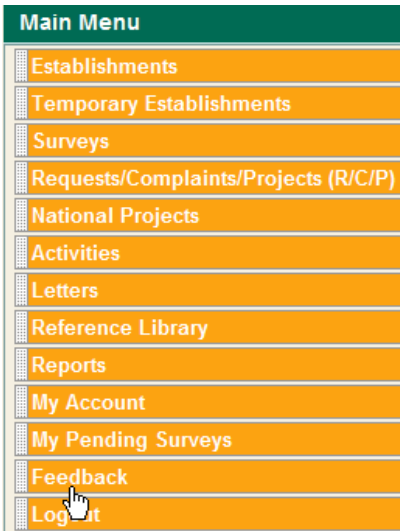


4.1 FEEDBACK

Feedback allows users to provide feedback to system administrators about suggestions to improve WebEHRS.

The Feedback module can be accessed from the Main Menu or from the Main Menu Bar within other modules. To navigate to Feedback from the Main Menu:

1. Click on the Feedback button.



WebEHRS displays an Add Feedback screen that allows the user to provide feedback in response to several questions. Feedback is used by the WebEHRS Support Team and the recommendations submitted by the user may be included in future updates to WebEHRS. The feedback questions include:

- Did you have any problems using WebEHRS?
- If Yes, please provide details?
- What would you change? (Please be specific)
- What would you like to see added that is currently not included and why?
- What would you like to see removed and why?
- What other information would you like to share?

The user must select yes or no from the dropdown for “Did you have any problems using WebEHRS?”. The user may also enter text in any or all of the text boxes for each of the questions.

Each question is limited to a 4,000 character response. A counter is provided to aid the user in tracking the length of his/her response.

Note: The feedback report should be used only to recommend changes to the WebEHRS application and/or process, not to provide specific record recommendations or with system errors (bugs). If the user encounters any application issues, please contact CDP Customer Support.

Add Feedback Cancel	
Please review these options before entering Feedback:	
For	Contact
- First-time log-in help - System Errors - "How-To's"	CDP Customer Support - 1-866-237-4814 or email customersupport@cdpehs.com
- Acquire a new user account - Change an existing user account	Your Area DEHS Division Director
- EH/IEH/IP Policy Questions	Your Area EH/IEH/IP Contact
<p>If the options above do not address your issue and you are making a recommendation for improvements to WebEHRS (e.g., request desired features, give ideas to make WebEHRS better), please use the Feedback Report to document your ideas.</p> <p>Suggestions for improving WebEHRS * The data entries and selections marked with a red asterisk are mandatory and must be completed.</p> <p>In an effort to keep WebEHRS up-to-date with your needs and requirements, we would like you to fill out this form if there are any changes you would like to see incorporated.</p> <p>This feedback report should be used only to recommend changes to the WebEHRS application and/or process, not to provide recommendations concerning a specific record you have submitted.</p> <p>Please note that each question is limited to a 4,000 character response.</p> <p>* Did you have any problems using WebEHRS? <input type="text" value="Please Select"/></p> <p>If yes, please provide details.</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <div style="text-align: right; font-size: small;"> Spell Check </div> </div> <p style="font-size: x-small;">(Maximum characters: 4000) You have <input type="text" value="4000"/> characters left.</p> <p>What would you change? (please be specific)</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <div style="text-align: right; font-size: small;"> Spell Check </div> </div> <p style="font-size: x-small;">(Maximum characters: 4000) You have <input type="text" value="3957"/> characters left.</p>	

The feedback screen is continued on the next page....

What would you like to see added that is not currently included and why?

[Spell Check](#)

(Maximum characters: 4000)
You have characters left.

What would you like to see removed and why?

[Spell Check](#)

(Maximum characters: 4000)
You have characters left.

What other information would you like to share with us?

[Spell Check](#)

(Maximum characters: 4000)
You have characters left.

Would you like to attach a file (document, picture, etc.) to your feedback?
Please remember that excessively large files can take a long time to load.
Click the Browse button below to select your file.

Thank you for your comments!

Thank you for taking the time to fill out the suggestion/feedback form and providing us with your suggested improvements. Your comments will be reviewed by the WebEHRS Support Team and may be included in future updates to WebEHRS.

To save feedback input, the user may:

- Click on the Save and Return to Main Menu button.

Or

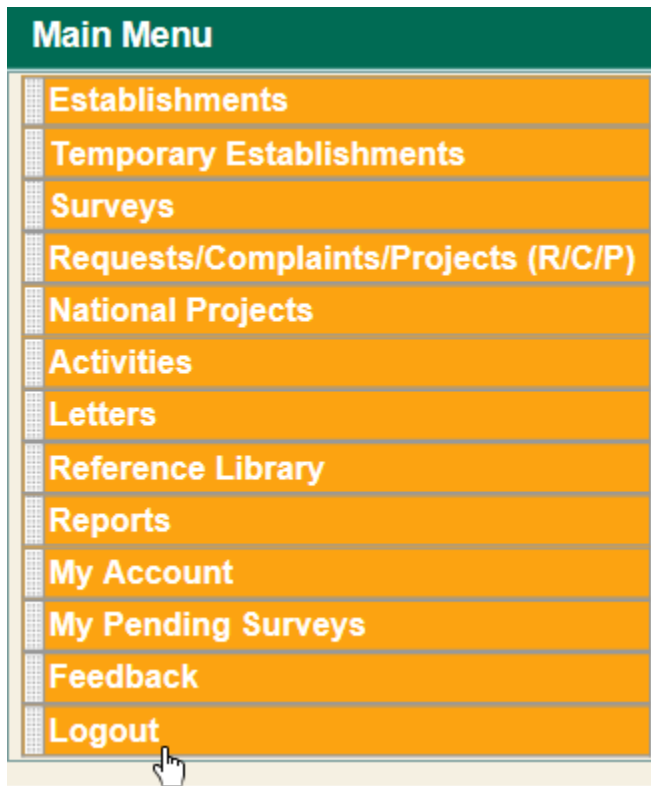
- Click on the Save and Submit Another Feedback Report button.

The user may also cancel and return to the Main Menu.

4.2 LOGOUT

Logout allows users to properly logout of WebEHRS. Logout can be accessed from the Main Menu or from the Main Menu Bar within other modules. To navigate to Logout from the Main Menu:

2. Click on the Logout button.



WebEHRS logs the user out and displays the Login screen.

The image shows a login form with a dark green header labeled "LOGIN". Below the header, there is a red asterisk and the text "Indicates required field". There are two input fields: "Username" and "Password", both with red asterisks. To the right of the input fields is a note: "Note: This system is designed to run on an Internet Explorer web browser. Using another web browser may impact performance." At the bottom of the form are two buttons: "Login" and "Forgot Password".

4.3 POST NEWS ITEMS

For specified Headquarters Level Users who have permissions to post news, a link is provided in the message window. To access the link:

1. Click [here](#) to post news items.



A new window opens and the user may compose a new item. A text editor is provided that allows the user to enter and edit the News Item. (There is no spell check in the text editor.)

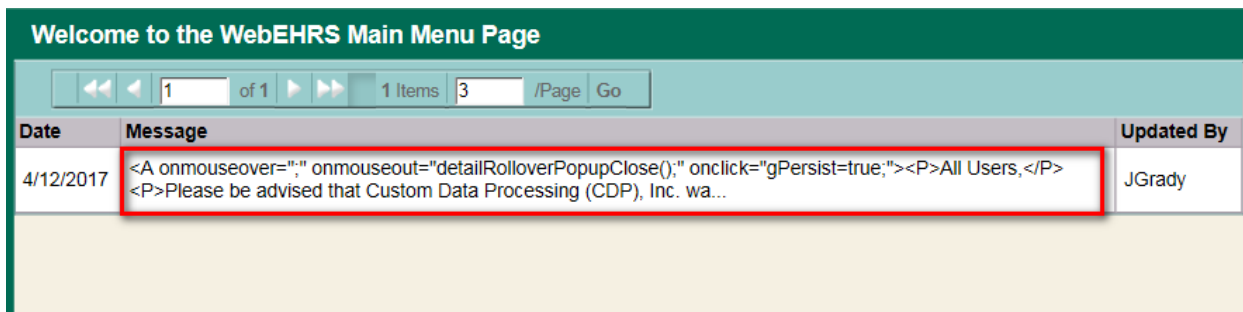
The user has the option to enter Effective dates From and Thru for the news item. The user can enter the effective date using the mouse and keyboard or by using the calendar.

The user can Save or Cancel the message.



If the user saves the message, a new message is posted and viewable by all users.

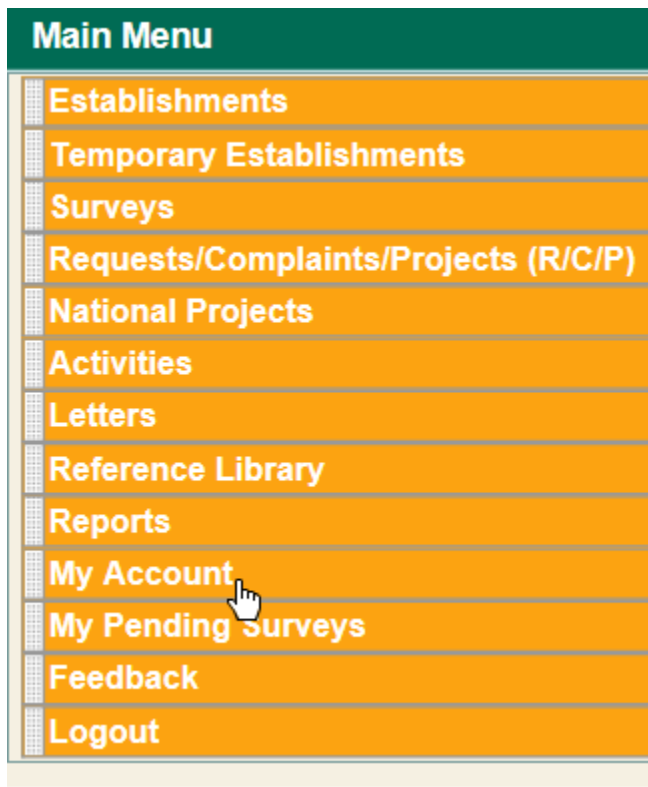
Note: If text is copied and pasted from another application such as Microsoft® Word, “embedded HTML code” will be copied into the message along with the text. The user will not be able to see the HTML coding until the information is posted to News Items. See example below:



5 MY ACCOUNT

My Account is used to manage the user's personal account and to access any system administrative functions that are assigned to the user. To navigate to My Account, go to the Main Menu:

1. Click on the My Account button.



Each user has a My Account page with functionality dependent on their role and security. All users will have access to the components listed under User Functions.

User Functions

[Change My Password](#)
Change your personal password

[View/Edit My User Account Information](#)
View/Edit your personal account information

[Read News Items](#)
View the News Items for WebEHRS

[My Pending Surveys](#)
A calendar with pending establishment surveys you have access to.

[Login History Calendar](#)
A calendar with your daily logins by month.

System Support Tables

[View System Tables](#)
Displays the Tables Menu page based on your permissions.

[View/Edit User Levels](#)
Displays the user level definitions and allows viewing and/or editing based on permissions.

Admin Functions

[Edit User Accounts](#)
Edit other user accounts based on your permissions

[View Failed Logins](#)
View Failed Logins

[Feedback Report](#)
View Feedback reports submitted

[Message Broadcast](#)
View/edit/create messages to be broadcast in WebEHRS

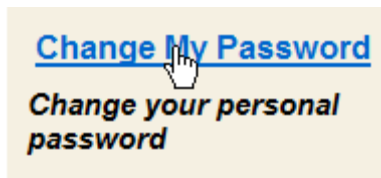
Core functionality for all users includes Change My Password, View/Edit My User Account Information, Read News Items, My Pending Surveys, and Login History.

Administrative Users also have System Support Tables and Admin Functions as shown in the central and right hand portion of the screen. The User Guide for System Support Tables and Admin Functions is provided in a separate document.

5.1 CHANGE MY PASSWORD

To change a Password, go to the Change My Password Function:

1. Click on the Change My Password link.



A new window will open with the Change Password function.

Change Password Cancel

Use the form below to change your password (you will be logged out.)

Passwords must be at least eight (8) non-blank characters in length not exceeding 50, and contain at least three (3) of the following types of characters:

- Uppercase letters (A through Z)
- Lowercase letters (a through z)
- Numbers (0 through 9)
- Special characters (! # \$ % - _ = + < >)

*** Indicates required field**

* Current Password

* New Password

* Confirm New Password

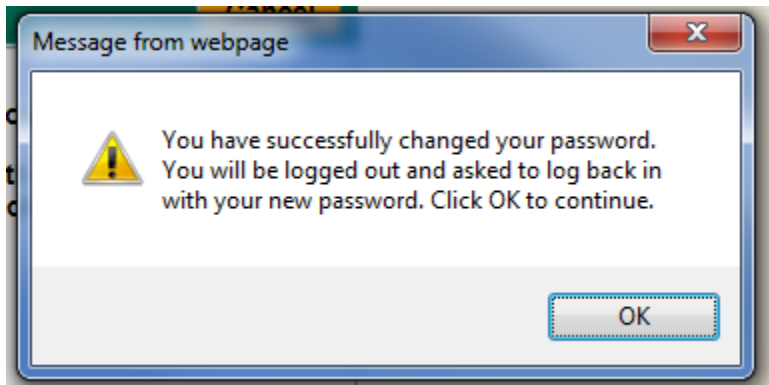
Change Password

To change the password:

1. Enter the Current Password.
2. Enter the New Password.
3. Enter New Password in Confirm New Password.
4. Click on the Change Password button.

The password will be changed and the user will receive a message that the password was successfully changed.

- Click on the OK button.




The user is returned to the Login window to login with the Username and new Password.

Note: Passwords must be changed every 90 days.

5.2 VIEW/EDIT MY ACCOUNT

All users have the ability to view and perform some edits using View/Edit My Account Information. To access user account information:

1. Click on the View/Edit My User Account Information link.



[View/Edit My User Account Information](#)
View/Edit your personal account information

WebEHRS displays the account information including user profile, mailing information and user filters that are setup for each user when an account is created. Users have rights to edit the account based on account permissions.

User information edits are restricted for the following:

- User Name,
- User Status,
- Active/Deleted,
- Title,
- Primary Area,
- User Level,
- Employed by,
- Works For,
- Data Filters.

If any of this information is incorrect, the user should notify his/her Area DEHS Division Director. The user may edit all other data. In this example, the Time Zone is incorrect and should be changed.

Edit My Account
Cancel

* Indicates required field

Username VGray
 User Status Finalized
 Active/Deleted Active

* First/Last Name

* Office Name/Description

* Physical Office Address:
 2nd address line is NOT required.

* City *State *ZIP Code

* Primary Phone Ext. * Type

Alternate Phone Ext. Type

Fax

* Time Zone *Use Daylight Saving? *Mobile User?

* Email Address

Title

Primary Area PHOENIX User Level

Employed By Works For

Mailing Information
 Check here if same as Physical Address

* Mailing Address:
 2nd address line is NOT required.

* City *State *Mailing ZIP Code

To edit My Account the user should:

1. Enter information or use the dropdowns for the editable data elements to make the corrections.

Edit My Account
Cancel

* Indicates required field

Username VGray
 User Status Finalized
 Active/Deleted Active

* First/Last Name

* Office Name/Description

* Physical Office Address:
 2nd address line is NOT required.

* City *State *ZIP Code

* Primary Phone Ext. * Type

Alternate Phone Ext. Type

Fax

* Time Zone *Use Daylight Saving? *Mobile User?

* Email Address

Title

Primary Area PHOENIX User Level

Employed By Works For

Mailing Information
 Check here if same as Physical Address

* Mailing Address:
 2nd address line is NOT required.

* City *State *Mailing ZIP Code

Users should also review Data Access Filters. Access Filters will determine what data users can access for Areas, Service Units, Communities, Establishment Types, Survey Types, Tribes and National Projects.

Save user account changes by:

1. Scroll to the bottom of the screen.
2. Click on the Save button.

Areas, Service Units, Reservation Codes, Tribes and Community Codes

Page will first load with only Areas. Once you select your area(s) with Ctrl-click, click the "Select Areas" button. This will result in the service units, tribes AND reservation code pick-lists being made visible and populated. You can then utilize the Ctrl-click process to select all service units. Then click the "Select SU's" button, and you will see community codes being visible and populated.

*** Indicates required field**

<p>* Area(s)</p> <div style="border: 1px solid #ccc; padding: 5px;"> Please Select All ALASKA ALBUQUERQUE BEMIDJI BILLINGS CALIFORNIA GREAT PLAINS HQE HQW NASHVILLE National All National Specific NAVAJO OKLAHOMA PHOENIX PORTLAND TUCSON </div> <p style="text-align: center; background-color: #f4a460; padding: 2px 10px; margin-top: 10px;">Select Areas</p>	<p>* Service Unit(s)</p> <div style="border: 1px solid #ccc; padding: 5px;"> Please Select All </div> <p style="text-align: center; background-color: #f4a460; padding: 2px 10px; margin-top: 10px;">Select SU's</p>	<p>* Community Code(s)</p> <div style="border: 1px solid #ccc; padding: 5px;"> Please Select All </div>
<p>* Reservation Code(s)</p> <div style="border: 1px solid #ccc; padding: 5px; width: 200px; margin: 0 auto;"> Please Select All </div>		
<p>* Tribe(s)</p> <div style="border: 1px solid #ccc; padding: 5px; width: 200px; margin: 0 auto;"> Please Select All </div>		

Establishment Types, Survey Types and National Project (Supplemental R/C/P) Types

<p>* Establishment Type(s)</p> <div style="border: 1px solid #ccc; padding: 5px;"> Please Select All 01 Comprehensive Health Care Referral Facility 02.1 Hospital w/ Surgery w/ DEHS Funded Safety Officer 02.2 Hospital w/ Surgery and No DEHS Funded Safety Officer 02.3 Hospital w/o Surgery /w DEHS Funded Safety Officer 02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Officer 03.1 Health Center w/ DEHS Funded Safety Officer 03.2 Health Center w/ no DEHS Funded Safety Officer 04 School Health Center </div>	<p>* Survey Type(s)</p> <div style="border: 1px solid #ccc; padding: 5px;"> Please Select All None Barber and Beauty Survey Drinking Water Survey FDA 2001 Food Survey FDA 2005 Food Survey FDA 2009 Food Survey FDA 2013 Food Survey Healthcare Survey </div>	<p>National Project (Supplemental R/C/P) Type(s)</p> <div style="border: 1px solid #ccc; padding: 5px;"> Please Select All Other </div>
--	--	--

Save/InProgress
Save/Finalized
Clear Filters
Cancel

5.3 ROLES AND PRIVILEGES

Roles and Privileges are determined by users with System Support and Admin privileges. These users can create new users and/or edit user accounts. When these users go to My Account, they will have access to additional functionality that will not be available to most users.



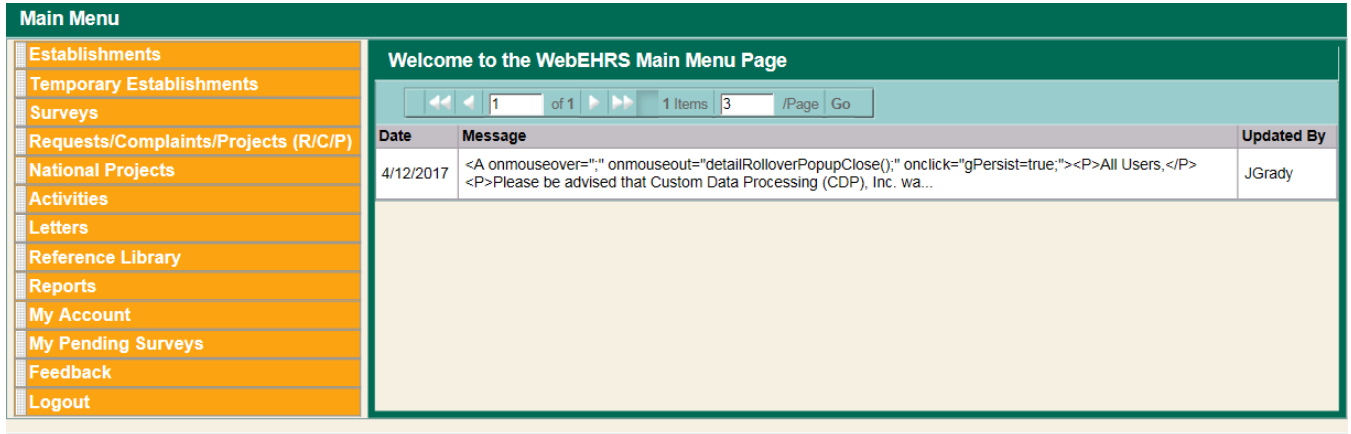
For additional information about user levels and roles and privileges, please see Appendix B.

5.4 READ NEW ITEMS

All users have the ability to Read News Items from the My Account screen or from the Main Menu login page. Access News Items from My Account by:

1. Click on the Read News Items link.





The Message window displays messages that are posted by authorized users including the date, message, and the user that posted or updated the message.

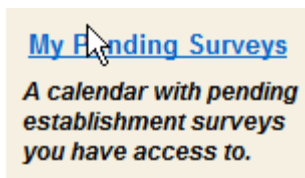
The News Items show the most recent 3 news items by default. View more News Items by using the forward and back arrow to scroll through the list of messages. Change the number of News Items per page to show more than 3 news items at once.



5.5 MY PENDING SURVEYS

All users have the ability to view My Pending Surveys from My Account. Access from My Account by:

1. Click on the My Pending Surveys link.



A new screen displays the pending surveys in a calendar view.

Main Menu							Estabs.	Temp. Estabs.	Surveys	R/C/P	Nat'l Proj's	Activities	Letters	Ref. Lib.	Reports	My Account	Feedback	Logout																
My Pending Surveys/Activities																	Detail View		Return to My Account															
My Filters	Please Select			Select Month		January	Select Year		2023	Type		Please Select			Search	Clear																		
(S)=Survey is Due, (A)=Activity is Due																																		
January 2023																																		
Sun	Mon	Tue	Wed	Thu	Fri	Sat																												
25	26	27 COLLINSVILLE FO... FSS - ST. FRANC... FSS-NAZLINI SEN... PINE RIDGE IHS ... More...	28 BISHOP-HEAD STA... FSS - SPRING CR... Fort Washakie P... POK Health Serv... More...	29 BISHOP-OVDCDC-EA... CROW/NORTHERN C... FT. BELKNAP KWI... Glacier Peaks H... More...	30 LCO-Crispy Frie... LCO-Quick Stop... LOWER BRULE - C... More...	31 ALLAKAKET CWS ... BARROW SSMH OP... BARROW SSMH OP... BARROW SSMH OP... More...	1	2 Hopi - Hopi Jr...	3	4 COTTONWOOD ASSI... COTTONWOOD GROU... HEART BUTTE SEN... WMAT - Rocky Mo... More...	5 HARD ROCK CASIN... ML Purchase Ref... ML Sokaogon Chi... NAZLINI HEAD ST... More...	6 BAR-CAMPO GOLDE... CAFE-CAMPO- GOLD... CAFE-CAMPO- GOLD... CAFE-CAMPO- GOLD... More...	7 CHEMEHUEVI - CH... MHA Interpretiv... More...	8	9	10 DAKOTA SIOUX CW... DAKOTA SIOUX LA... More...	11 CAFE-BARONA CAS... CAFE-BARONA CAS... CAFE-BARONA CAS... CAFE-BARONA CAS... More...	12 FALLON-SENIOR C... GCML 1991 Bar ... GCML 1991 Kitch... GCML Associate ... More...	13 AK-CHIN - HARRA... Comanche WarPon... More...	14 YERINGTON - FOO... YERINGTON - SEN... YERINGTON - SEN... More...	15	16	17	18 GCH Double Diam... GCH Mntnc. Shop... GCH Provisions ... GCH Stories Bar... More...	19 C&A Lucky Star ... C&A Travel Cent... GCH Banquets/Pr... GCH Bar 411 (S... More...	20 LADOTS CAR WASH... Lucky Star Casi... SC Andahwod Sen... SC Nimkee Welln... More...	21	22 BISHOP-WANAAHA ... More...	23 COFFEYVILLE CAS... FSS - IYANBITO ... More...	24 BLACKFEET BIA D... Knights of Colu... LADOTS BINGO HA... Lucky Star Casi... More...	25 BACA SENIOR CIT... Red Lake Hospit... Sault Tribe Ear... More...	26 Staybridge Suit... More...	27 SALT RIVER - A... SCAT - San Carl... More...	28 ANTELOPE COMMUN... MARKOMA CAMPUS ... Mission Single... Mission-Men w C... More...

The default view is for the current month and year with the ability to select alternative Months and Years from dropdowns. Additionally, the calendar can be filtered by My Filters and Type. The Types are indicated by an S for Survey is Due, and A for Activity is Due.

My Pending Surveys/Activities																	Detail View		Return to My Account	
My Filters	Please Select			Select Month		January	Select Year		2023	Type		(A) - Activities Due			Search	Clear				
(S)=Survey is Due, (A)=Activity is Due																				
January 2023																				
Sun	Mon	Tue	Wed	Thu	Fri	Sat														

Each date box contains Establishment Names for the Establishments with a Survey Due scheduled on that date. The Establishment Names display as a hyperlink; the link takes the user to the Edit Establishment page for that Establishment.

Each Establishment hyperlink will have a mouse-over pop-up message that displays the following data elements: Establishment Name, Last Survey Date, Last Survey Type, Last Survey Purpose, and Next Survey Purpose. The calendar view enables the users to navigate forward and backward (month-to-month and year-to-year).

Note: If dates on the calendar have too many surveys to list, the calendar displays a [More..](#) link in the calendar. To see additional items, the user may click on the link. A new window will open with a list of additional pending surveys.

A detailed view of the calendar can be displayed by clicking the Detail View button.

Main Menu | Estabs. | Temp. Estabs. | Surveys | R/C/P | Nat'l Proj's | Activities | Letters | Ref. Lib. | Reports | My Account | Feedback | Logout

My Pending Surveys/Activities – Detail View Monthly Snapshot

My Filters: Please Select Due Date: 01/01/2023 to 01/31/2023 Type: Please Select Search Clear

(S)=Survey is Due, (A)=Activity is Due

Map It! 1 of 15 147 Items 10 / Page

File ID	Premise Name	Address	Due Date
<input type="checkbox"/> ES31718	BURNT CORN BUILDING - SENIOR CENTER	PO BOX 4470 BLUE GAP	1/2/2023 (S)
<input type="checkbox"/> ES31724	BURNT CORN BUILDING SENIOR CENTER KITCHEN	BOX 4427 BLUE GAP	1/2/2023 (S)
<input type="checkbox"/> ES19939	FOREST LAKE SENIOR CITIZEN CENTER	PO Box 2092 Chinle	1/2/2023 (S)
<input type="checkbox"/> ES23579	FSS-FOREST LAKE SENIOR CITIZEN CENTER KITCHEN	PO Box 2092 Chinle	1/2/2023 (S)
<input type="checkbox"/> ES4514	HopI - HopI Jr./Sr. High School	P.O. Box 337 Keams Canyon	1/2/2023 (S)
<input type="checkbox"/> ES18788	COTTONWOOD ASSISTED LIVING GROUP HOME B	P.O. Box 69 Chinle	1/4/2023 (S)
<input type="checkbox"/> ES30780	COTTONWOOD GROUP HOME BLDG C	P.O. BOX 69 COTTONWOOD	1/4/2023 (S)
<input type="checkbox"/> ES12647	HEART BUTTE SEN CITZ CENTER	Main Street Heart Butte	1/4/2023 (S)
<input type="checkbox"/> ES32134	WMAT - Rocky Mountain Spotted Fever Trailer	309 W Elm St Whiteriver	1/4/2023 (S)
<input type="checkbox"/> ES20799	HARD ROCK CASINO ENVIRONMENTAL (LBF)	777 S. Cherokee St Catoosa	1/5/2023 (S)

The Detail View shows the pending surveys and activities in a table format displaying the File ID, Premise Name, Address, and Due Date.

The Detail View gives the ability to map the premises by checking multiple locations, then clicking Map It! A Google Map will open giving directions and show a map to the locations.

My Pending Surveys/Activities – Detail View				Monthly Snapshot
My Filters		Please Select	Due Date	01/01/2023 to 01/31/2023
			Type	Please Select
				Search Clear
(S)=Survey is Due, (A)=Activity is Due				
Map It! [Icons] 1 of 15 147 Items 10 / Page				
File ID	Premise Name	Address	Due Date	
<input type="checkbox"/> ES31718	BURNT CORN BUILDING - SENIOR CENTER	PO BOX 4470 BLUE GAP	1/2/2023 (S)	
<input type="checkbox"/> ES31724	BURNT CORN BUILDING SENIOR CENTER KITCHEN	BOX 4427 BLUE GAP	1/2/2023 (S)	
<input checked="" type="checkbox"/> ES19939	FOREST LAKE SENIOR CITIZEN CENTER	PO Box 2092 Chinle	1/2/2023 (S)	
<input checked="" type="checkbox"/> ES23579	FSS-FOREST LAKE SENIOR CITIZEN CENTER KITCHEN	PO Box 2092 Chinle	1/2/2023 (S)	
<input type="checkbox"/> ES4514	Hopi - Hopi Jr./Sr. High School	P.O. Box 337 Keams Canyon	1/2/2023 (S)	
<input type="checkbox"/> ES18788	COTTONWOOD ASSISTED LIVING GROUP HOME B	P.O. Box 69 Chinle	1/4/2023 (S)	

5.6 LOGIN HISTORY CALENDAR

The User Login History report can be accessed from the My Account page.

1. Click on the Login History Calendar link.

[Login History Calendar](#)

A calendar with your daily logins by month.

A new screen displays the logins for users in a calendar view. The default view is for the current month and year with the ability to select an alternative Month and/or Year from the dropdowns

Note: If dates on the calendar have too many users to display, the calendar displays a [More..](#) link in the calendar. To see additional users, the user may click on the link. A new window will open with a list of additional users.

Login Calendar							Return to My Account
Select Month		November	Select Year		2011		
November 2011							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
		1 Brown, Charlie Gray, Violet	2 Gray, Violet	3	4 Brown, Charlie	5	
6	7 Gray, Violet	8 Gray, Violet	9	10	11	12	
13	14 Gray, Violet	15 Brown, Charlie Gray, Violet	16 Gray, Violet	17 Gray, Violet	18	19	
20	21	22	23	24	25	26	
27	28	29	30				

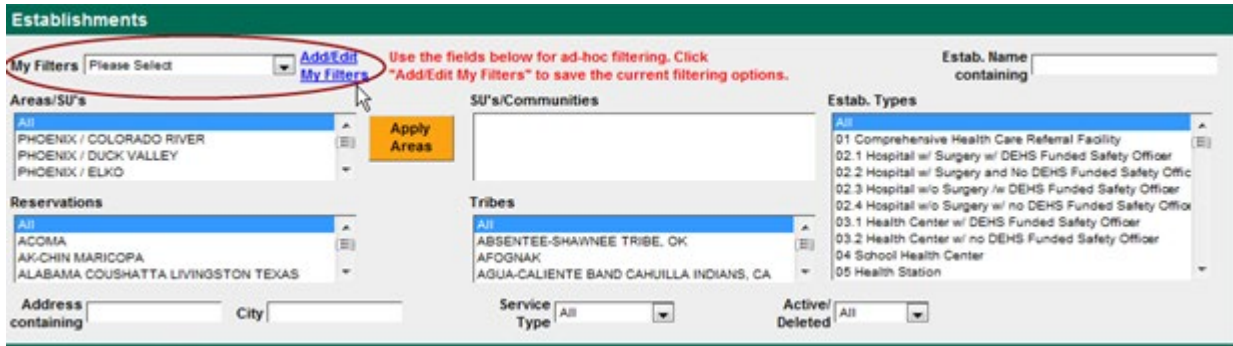
Each date box contains User Records names for each user that executed a successful login on that date. The user record name is shown in the date box as a literal display only. The report also shows User Record names within the date boxes for users who have successfully executed Mobile Form submissions. The calendar view enables the user to navigate forward and backward (month-to-month and year-to-year).

6 MY FILTERS

A filter is the use of one or more selection criteria used to specify parameters for performing a database search. My Filters allows users to create and access their commonly used queries for quick access.

Users may create and edit My Filters. There are no limits to the number of My Filters that a user can create. The following fields are available for building My Filters for most modules:

- Areas/SU's,
- SU's/Communities,
- Reservation,
- Establishment Type,
- Tribe,
- Active/Deleted,
- Establishment Name (containing),
- Address (containing),
- City, and
- Service Type.



WebEHRS also supports using filters for Additional Search Options. Additional Search Options are module specific based on the search requirements for each module. For example, additional search options for establishments include RRM Status, Establishment #, and Establishment Status.



Additional Search Options can be stored with "My Filters" or can be used dynamically to perform searches.

Filters created in one module can also be used in other modules. For example, if a filter is created in the Establishment Module, the filter will be available in Temporary Establishments,

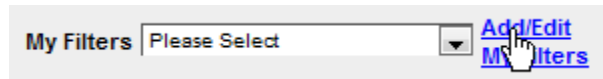
Surveys, R/C/Ps, etc. Additional detailed information about Filters and how to best use filters is provided in Appendix C – Using Filters in WebEHRS.

6.1.1 ADD FILTERS

Users can create, edit, save, and delete My Filters.

To create a new My Filter:

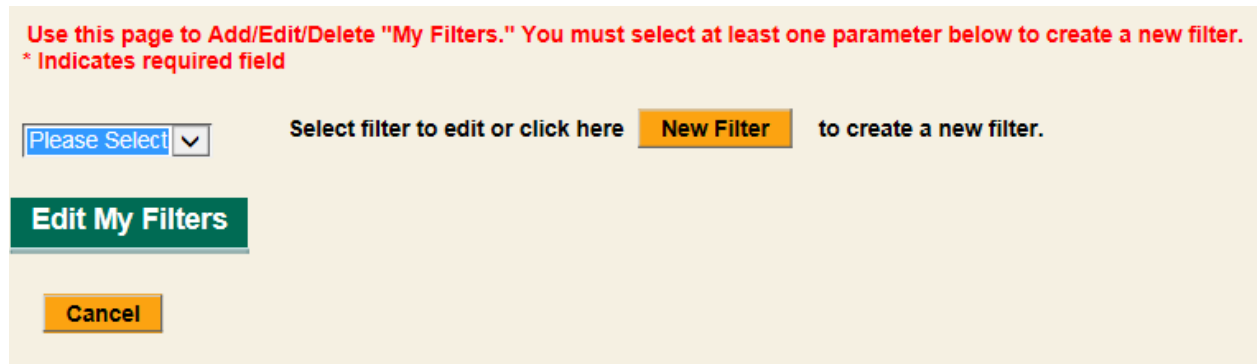
1. Click on the "Add/Edit My Filters" link.



WebEHRS will open a new screen for the user to edit an existing My Filter or add a new filter.

To create a new filter:

1. Click on the New Filter button.



The application opens a new window to create a new filter.

1. Enter a New Filter Name.
2. Add a description for the filter.
3. Edit one or more filters for the new filter.

Note: The user must select at least one parameter that is different from the defaults to create a My Filter.

Use this page to Add/Edit/Delete "My Filters." You must select at least one parameter below to create a new filter.
* Indicates required field

Please Select Select filter to edit or click here **New Filter** to create a new filter. **Clear Filter**
Delete Filter

Edit My Filters

* New Filter Name PHOENIX AREA FOOD EST
Description FILTER FOR ACTIVE PHOENIX AREA FOOD ESTABLISHMENTS

Area(s)/Service Unit(s)
OKLAHOMA / TAHLEQUAH
OKLAHOMA / TALIHNA
OKLAHOMA / WEWOKA
OKLAHOMA / WICHITA
PHOENIX / COLORADO RIVER
PHOENIX / DUCK VALLEY
PHOENIX / ELKO
PHOENIX / FORT YUMA
PHOENIX / GILA RIVER HCC
PHOENIX / KEAMS CANYON

Community(s)
Please Select
All
COLORADO RIVER / BIG RIVER
COLORADO RIVER / BLYTHE
COLORADO RIVER / BOUSE
COLORADO RIVER / BULLHEAD CITY
COLORADO RIVER / CHEMEHUEVI VALLEY
COLORADO RIVER / CHLORIDE
COLORADO RIVER / DOLAN SPRINGS
COLORADO RIVER / EARP

Reservation(s)
Please Select
All
AK-CHIN MARICOPA
BATTLE MOUNTAIN COLONY
BENTON PAIUTE
BIG PINE
BISHOP
BRIDGEPORT
CAMP ANTELOPE
CAMP VERDE-MIDDLE VERDE

Establishment Type(s)
33 Barber/Beauty Shop
34 Industrial or Manufacturing Establishment
35 Injury Prevention 10 MDI/500-User Population)
42 Bakery, Cannery, Botting
43 Slaughter House, Fish-processing Plant
44 Senior Citizens' Center
45 Food Warehouse
46 Trading Post, Grocery, Convenience Store
47 Cafe/Restaurant
48 Bar

Tribe(s)
Please Select
All
(141) ABSENTEE-SHAWNEE TRIBE, OK
(710) AFOGNAK
(263) AGUA-CALIENTE BAND CAHULLA INDIANS, CA
(711) AHKOOK-KAGUYAK NATIVE CORPORATION
(500) AHTNA, INC.
(360) AK CHIN INDIAN COMM. PAPAGO IND, AZ
(501) AKHIOK, NATVE VILLAGE OF AKHIOK, AK
(502) AKIACHAK, NATVE VILLAGE OF AKIACHAK, AK

Active/Deleted Active RRM Status Please Select
Establishment Name
Establishment Number Address Containing
City
Estab Status Please Select Service Type Please Select Risk Type Please Select
A1 A2 District

Save & Return **Save & New Filter** **Cancel**

The user has the option to:

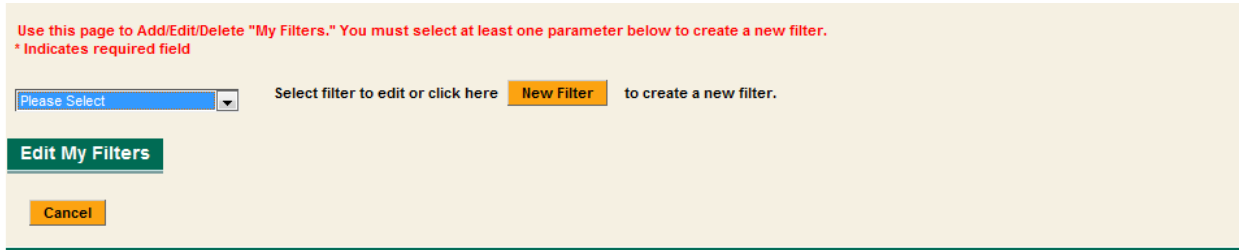
- Save and Return,
- Save and New Filter, or
- Cancel.

Note: Search fields that are formatted as free-form text entry boxes contain a "Look Ahead" feature. As the user enters text into the text box, the system will actively scan the database and provide suggestions to the user. Suggestions will appear on the screen in a drop down list box (immediately below the text box). To use a "Look Ahead" suggestion, select it from the drop down list with your mouse.

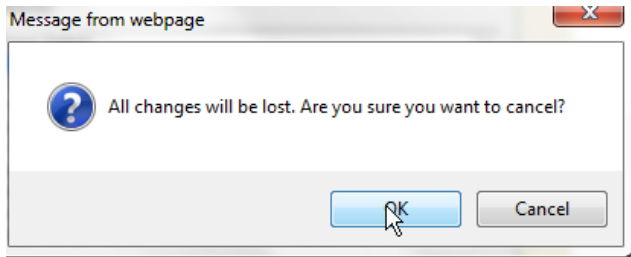
Note: If the user clicks Select Area/Service Units, picklist boxes for Communities, Reservations, and Tribes will automatically change to include only relevant lists.

If the user clicks on the Save and Return button, the new filter will be saved and the user will be returned to the search screen with the new filter selected.

If the user clicks on the Save and New Filter button, the New Filter will be saved and the user will be provided with a new screen to add/edit My Filters.



If the user clicks on the Cancel button from the Edit My Filters page, the system prompts the user with a warning message:



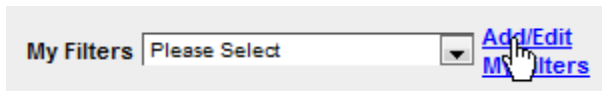
If the user clicks on the OK button, a screen will appear with the search screen for the module in use.

If the user clicks on the Cancel button, the user will be returned to the Edit My Filters Screen.

6.1.2 EDIT FILTERS

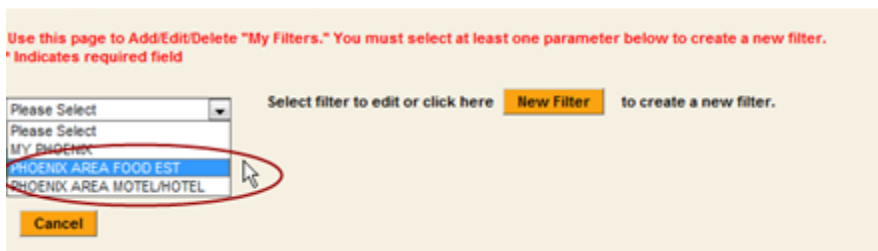
To edit a filter:

1. Click on the Add/Edit My Filters link.



WebEHRS opens a new screen for the user to work with My Filters. For an existing My Filter, first:

1. Select a filter from the dropdown.



WebEHRS refreshes the screen and shows the fields to edit the selected filter. The user can:

- Edit the description and one or more filters for the existing filter.

Use this page to Add/Edit/Delete "My Filters." You must select at least one parameter below to create a new filter.
 * Indicates required field

PHOENIX AREA FOOD EST Select filter to edit or click here to create a new filter.

Edit My Filters

Description: FILTER FOR PHOENIX AREA OPEN FOOD ESTABLISHMENTS

Area(s)/Service Unit(s):
 OKLAHOMA / WEWOKA
 OKLAHOMA / WICHITA
 PHOENIX / COLORADO RIVER
 PHOENIX / DUCK VALLEY
 PHOENIX / ELKO
 PHOENIX / FORT YUMA
 PHOENIX / GILA RIVER HCC
 PHOENIX / KEAMS CANYON
 PHOENIX / NON SERVICE UNIT
 PHOENIX / PHOENIX

Community(s):
 Please Select
 All
 COLORADO RIVER / BIG RIVER
 COLORADO RIVER / BLYTHE
 COLORADO RIVER / BOUSE
 COLORADO RIVER / BULLHEAD CITY
 COLORADO RIVER / CHEMEHUEVI VALLEY
 COLORADO RIVER / CHLORIDE
 COLORADO RIVER / DOLAN SPRINGS
 COLORADO RIVER / EARP

Reservation(s):
 Please Select
 All
 AK-CHIN MARICOPA
 BATTLE MOUNTAIN COLONY
 BENTON PAIUTE
 BIG PINE
 BISHOP
 BRIDGEPORT
 CAMP ANTELOPE
 CAMP VERDE-MIDDLE VERDE

Establishment Type(s):
 35 Injury Prevention 10 MD/500-User Population)
 42 Bakery, Cannery, Bottling
 43 Slaughter House, Fish-processing Plant
 44 Senior Citizens' Center
 45 Food Warehouse
 46 Trading Post, Grocery, Convenience Store
 47 Cafe/Restaurant
 48 Bar
 49 Bingo Parlor / Gaming Facility
 50 Community Building, Chapter House

Tribe(s):
 Please Select
 All
 (141) ABSENTEE-SHAWNEE TRIBE, OK
 (710) AFOGNAK
 (263) AGUA-CALIENTE BAND CAHUILLA INDIANS, CA
 (711) AHKIOK-KAGUYAK NATIVE CORPORATION
 (500) AHTNA, INC.
 (360) AK CHIN INDIAN COMM. PAPAGO IND, AZ
 (501) AKHIOK, NATIVE VILLAGE OF AKHIOK, AK
 (502) AKIACHAK, NATIVE VILLAGE OF AKIACHAK, AK

Active/Deleted: Active Please Select

Establishment Name:

Establishment Number: Address Containing:

City:

Estab Status: A1 Open

Service Type: A2:

Risk Type: District:

After the user performs all desired edits to the My Filter, the user will have options to:

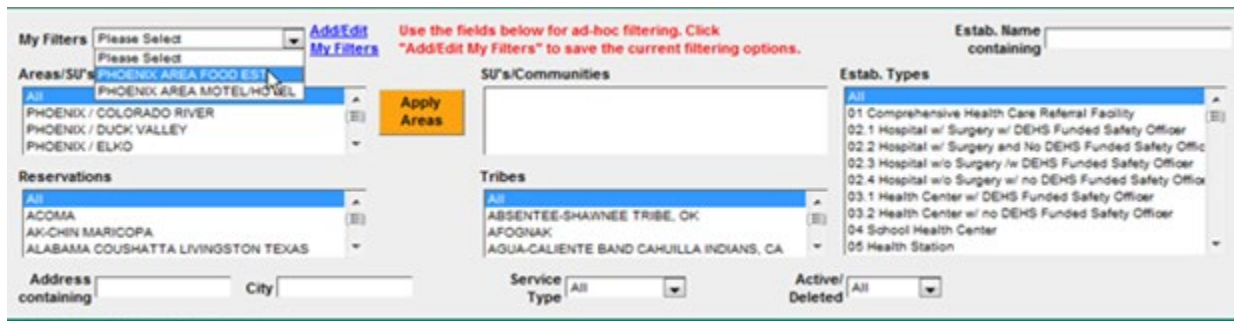
- Save & Return.
- Save & New Filter.
- Cancel.

Note: If the user changes filters, refresh before conduction a new search.

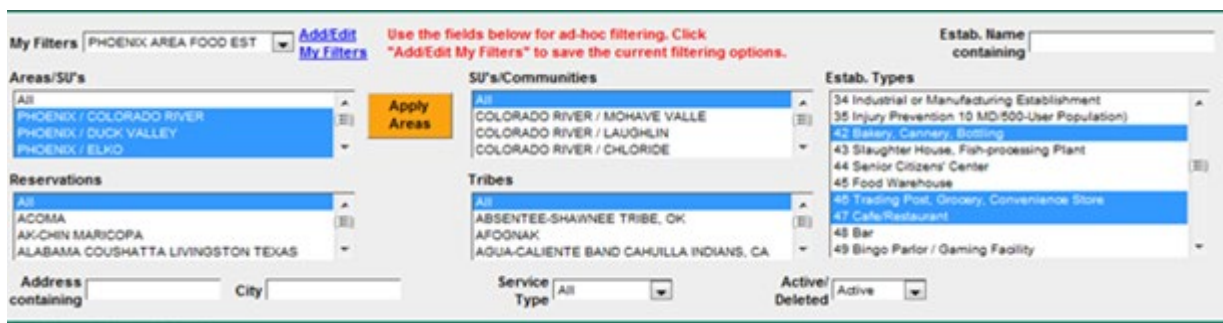
6.1.3 USING MY FILTERS

To use a My Filter:

1. Select a filter from the "My Filters" dropdown list in the top left corner of the Search Filters.



After a My Filter is selected, the search fields populate with the relevant criteria for the chosen My Filter.

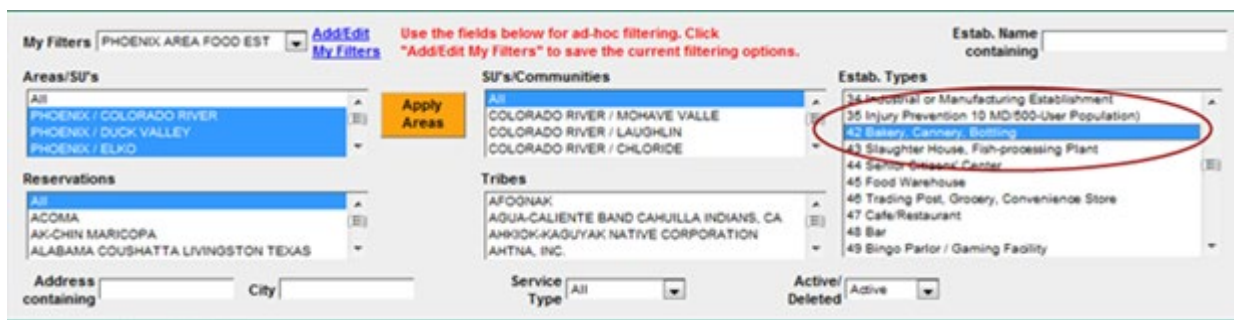


Before performing the search, the user can modify the search criteria by selecting different or additional values. To specify additional criteria:

- Edit or make additional selections from the picklist or dropdown list boxes.

And/Or

- Edit or enter additional criteria in the text search fields, such as “Estab. Name containing” or “City.”



7 ESTABLISHMENTS

The Establishments module allows users to search, view, edit, and add establishments. This Module also provides tools to assist the user and manage relationships between establishments and information contained in other modules.

The Show Table Screen for Establishments includes multiple panels:

- The top panel is the My Filters and basic search options.
- The second panel is Additional Search Options, Search to execute a search, or Clear to clear the search criteria and search results.
- A row of Menu Buttons separates the Search Filters sections from the result set. Menu Buttons appear in the panel depending upon user permissions.
- The Show Table panel provides the user with a listing of Establishments that the user has permissions to view that meet the search parameters in the top half of the screen.

The screenshot displays the 'Establishments' module interface. At the top, there are 'My Filters' (Phoenix Area) and 'Estab. Name containing' (Kenny). Below this is a section for 'Additional Search Options' with dropdowns for RRM Status, Risk Type, Establishment #, and Estab. Status, along with search and clear buttons. A row of menu buttons includes 'Add New', 'Copy', 'Attachments', 'Surveys', 'R/C/P', 'Activities', 'Child Relationships', 'Parent Relationships', 'Edit Supplemental', 'Comments', 'Letters', 'App', 'Surv Hist', and 'Audit'. The main table lists establishment details:

Estab. #	Estab. Type	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map
6000470001	47 Cafe/Restaurant	KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX Arizona 85004	(602) 364-5078	123 DOES NOT EXIST STREET PHOENIX Arizona 85004	Active Category I - High Open	Kenny Hicks 2/14/2014	khicks khicks	8/13/2013 2/24/2014	

7.1 SEARCH

The Establishments Module allows the user to search for one or more establishments. WebEHRS provides extensive filter options for performing searches to include name, location, type, status, etc.

7.1.1 SEARCH BY ESTABLISHMENT NAME

To search by Establishment Name:

1. Click the Estabs button at the top of the Menu Bar or the Establishments button on the Main Menu screen.
2. Enter all or a portion of an Establishment Name in the “Estab. Name containing” field.
3. Click the Search button.

Establishments

My Filters: Phoenix Area [Add/Edit My Filters](#)

Use the fields below for ad-hoc filtering. Click "Add/Edit My Filters" to save the current filtering options.

Estab. Name containing:

Areas/SU's

- All
- ALASKA / ANCHORAGE
- ALASKA / ANNETTE ISLAND
- ALASKA / BARROW

Reservations

- All
- ACOMA
- AK-CHIN MARICOPA
- ALABAMA COUSHATTA LIVINGSTON TEXAS

SU's/Communities

Tribes

Estab. Types

- 02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Officer
- 03.1 Health Center w/ DEHS Funded Safety Officer
- 03.2 Health Center w/ no DEHS Funded Safety Officer
- 04 School Health Center
- 05 Health Station
- 06 Dental Health Station
- 07 Dialysis Unit
- 08 Nursing Care Facility
- 09 X-Ray Unit, Medical
- 10 X-Ray Unit, Dental

Address containing: _____ City: _____

Service Type: All

Active/Deleted: Active

Additional Search Options

RRM Status: All Risk Type: All Establishment #: _____ Estab. Status: All

A1: _____ A2: _____ District: _____

Search **Clear**

WebEHRS performs the search based on the “Estab. Name containing” value and returns the results the Show Table panel.

Surveys	R/C/P	Activities	Child Relationships	Parent Relationships	Edit Supplemental	Comments	Letters	App	Surv Hist	Audit
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6000470001										
47 Cafe/Restaurant										
AK CHIN INDIAN COMM. PAPAGO										
IND, AZ										
KENNY'S TEST CAFE										
123 DOES NOT EXIST										
STREET										
PHOENIX Arizona 85004										
(602) 364-5078										
123 DOES NOT EXIST										
STREET										
PHOENIX Arizona 85004										
Active										
Category I -										
High										
Open										
Kenny Hicks										
2/14/2014										
khicks										
khicks										
8/13/2013										
2/24/2014										

7.1.2 ADDITIONAL SEARCH OPTIONS

The user may also perform searches using the Additional Search Options:

1. Click the Clear button to reset the Search Filters.
2. Enter or select the search criteria in the fields under “Additional Search Options”
3. Click the Search button.

Establishments

My Filters: MY PHOENIX [Add/Edit My Filters](#) Use the fields below for ad-hoc filtering. Click "Add/Edit My Filters" to save the current filtering options. Estab. Name containing: _____

Areas/SU's
 All
 PHOENIX / COLORADO RIVER
 PHOENIX / DUCK VALLEY
 PHOENIX / ELKO [Apply Areas](#)

Reservations
 All
 ACOMA
 AK-CHIN MARICOPA
 ALABAMA COUSHATTA LIVINGSTON TEXAS

SU's/Communities
 All
 COLORADO RIVER / MOHAVE VALLE
 COLORADO RIVER / LAUGHLIN
 COLORADO RIVER / CHLORIDE

Tribes
 All
 ABSENTEE-SHAWNEE TRIBE, OK
 AFOGNAK
 AGUA-CALIENTE BAND CAHUILLA INDIANS, CA

Estab. Types
 All
 01 Comprehensive Health Care Referral Facility
 02.1 Hospital w/ Surgery w/ DEHS Funded Safety Officer
 02.2 Hospital w/ Surgery and No DEHS Funded Safety Officer
 02.3 Hospital w/o Surgery w/ DEHS Funded Safety Officer
 02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Officer
 03.1 Health Center w/ DEHS Funded Safety Officer
 03.2 Health Center w/ no DEHS Funded Safety Officer
 04 School Health Center
 05 Health Station

Address containing: _____ City: _____ Service Type: All Active/Deleted: Active

Additional Search Options
 RRM Status: Pending RRM Credit Approval Risk Type: All Establishment #: _____ Estab. Status: All
 A1: _____ A2: _____ District: _____ [Search](#) [Clear](#)

Based on the search criteria, WebEHRS returns the results in the Show Table panel. In this example, the result set includes all establishments within the Phoenix Area that have a RRM Status set to "Pending RRM Credit Approval."

Additional Search Options

RRM Status: Pending RRM Credit Approval Risk Type: All Establishment #: _____ Estab. Status: All
 A1: _____ A2: _____ District: _____ [Search](#) [Clear](#)

[Add New](#) [Copy](#) [Attachments](#) [Print](#) [Excel](#) [PDF](#) [Refresh](#) [Close](#)

1 of 3 30 Items 10 /Page Go

[Surveys](#) [R/C/P](#) [Activities](#) [Child Relationships](#) [Parent Relationships](#) [Edit Supplemental](#) [Comments](#) [Letters](#) [App](#) [Surv Hist](#) [Audit](#)

<input type="checkbox"/>	Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map
<input type="checkbox"/>	6066330009 33 Barber/Beauty Shop YAVAPAI-PRESCOTT TRIBE, AZ	A BORGATA SALON & SPA - PRESCOTT RESORT 1500 East State Route 69 Prescott Arizona 86301	(928) 443-9119	Jan Stauffer	Active Open	12/27/2016		1/9/2017 1/9/2017	
<input type="checkbox"/>	6066471221 47 Cafe/Restaurant AK CHIN INDIAN COMM. PAPAGO IND, AZ	AK-CHIN - HOT SOS FOOD TRUCK 44301 Maricopa/Casa Grande Hwy Maricopa Arizona 85138	(619) 737-6438 jimmiefirs@gmail.com		Active Open	1/11/2017		1/17/2017 1/20/2017	

7.2 VIEW/SHOW RECORDS

From the Show Table panel, the user can view an establishment record, edit an establishment record, or select an establishment to perform one of the functions in the Menu panel. The user may also view scanned documents associated with an establishment and use the Google Map icon to navigate to an establishment's location.

<input type="checkbox"/>	Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map
<input type="checkbox"/>	6000470001 47 Cafe/Restaurant AK CHIN INDIAN COMM. PAPAGO AZ	KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX Arizona 85004	(602) 364-5078	123 DOES NOT EXIST STREET PHOENIX Arizona 85004	Active Category I - High Open	2/14/2014		8/13/2013 5/19/2017	

[Show Record](#)


7.2.1 VIEW ESTABLISHMENT RECORD

After a search is executed, the user can view any of the returned records. To view an establishment:

1. Click on the magnifier icon for the desired establishment.

	Estab. # Estab. Type Permit #	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date	Google Map
	<input type="checkbox"/> 6066141000 14 Foster Care Homes	GREAT PUMPKIN FOSTER CARE 5000 N CENTRAL AVE PHOENIX Arizona 56013	(502) 695-1999	5000 N CENTRAL AVE PHOENIX Arizona 56013	Active Open		
Show Record							

WebEHRS opens a new screen with a summary of information for the selected establishment including any comments. *Note: If a comment has an alert, the comment text for the establishment will be shaded.*








View Establishment				OK	
Establishment #	6000470001	*Estab. Status	Open	*Estab. Type	47 Cafe/Restaurant
*Area/SU	PHOENIX/NON SERVICE UNIT	*SU/Community	NON SERVICE UNIT/Unspecified Community		
Reservation	_UNKNOWN-PHX_	*Tribe	AK CHIN INDIAN COMM. PAPAGO IND, AZ	Service Type	Direct Service
A1		A2		District	
RRM Status	Non-RRM Creditable	Risk Type	Category I - High	Active/Deleted	Active
Permit Information				Click to Show Details.. 	
Premise Information					
Parent Establishment					
*Establishment Name	KENNY'S TEST CAFE				
*Address 1	123 DOES NOT EXIST STREET				
Address 2					
*City	PHOENIX	*State	Arizona	*ZIP Code	85004 Google Map Via Address..
Primary Phone	(602) 364-5078	Ext.	Type	Work	Name
Alternate Phone		Ext.	Type		Name
Fax Number					
Email Address	Website				
Latitude/ Longitude	Google Map via Coordinates..		Land Status		
GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)					
Water Supply	Liquid Waste Disposal				
Solid Waste Method					
Year Built	Seasonal?				
Smoke Free?	If no, smoking policy in place?		Description		
Manager First Name	JOHN	Manager Last Name	SMITH		
Primary Phone		Ext	Type	Name	
Alternate Phone		Ext	Type	Name	
Certified Food Manager Employed?	If yes, enter Certification #				
Cert Food Mgr First Name	Cert Food Mgr Last Name				
Cert Food Mgr Phone		Ext	Type		
Safety Officer First Name	Safety Officer Last Name				
Safety Officer Phone		Ext.	Type		
Safety Officer Email Address					
Hours Of Operation					
Next Survey Purpose	Routine	Next Survey Date	8/14/2014		
Last Survey Date	2/14/2014	Performed By	Kenny		
Opening Date		Closing Date	Activity Due Date		

Owner Information	
Name	Corporate Name
Address 1	123 DOES NOT EXIST STREET
Address 2	
City	PHOENIX
State	Arizona
ZIP Code	85004
Primary Phone	(602) 364-5078
Ext	
Type	Work
Name	
Alternate Phone	
Ext	
Type	
Name	
Fax Number	
Email Address	
Mailing Information	
Name	
Address 1	123 DOES NOT EXIST STREET
Address 2	
City	PHOENIX
State	Arizona
ZIP Code	85004
Created On	8/13/2013
Created By	khicks
Last Updated	2/24/2014
Updated By	khicks
View Comments	
OK	

Additionally, if there is an “alert” associated with the selected establishment, a pop-up window will appear to allow the user to view the entire comment and make adjustments necessary while also providing access to all other comments associated to the establishment. The user has the option to view the establishment or click OK to close the window and return to the Establishment Screen. The summary can be printed if needed using the print page icon on the Internet browser.

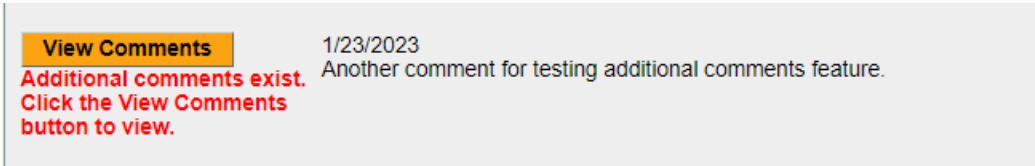
Some users will have access to the Permit Information section on the View Establishment screen. Permit Information will be available in the system for capturing permit demographics. This section, by default, will not show for all users. The Permit Information Section can be enabled by removing the restriction from the User Permissions page. (To enable the Permit Information Section, a user would contact a supervisor with rights to edit User Filters/User Permissions.)

Note: Click to Hide Details icon on the panel can be used to expand and collapse the panel.

Permit Information		Click to Hide Details 	
Permit Number	<input type="text"/>	Permit Status	Please Select 
Permit Issued	<input type="text"/> 	Permit Expiration	<input type="text"/> 
Renewal Status	Please Select 	Renewal Sent	<input type="text"/> 
Renewal Received	<input type="text"/> 	Fee Waived?	<input type="checkbox"/>
Fee Amount	<input type="text"/>		

7.2.2 COMMENTS AND ALERTS

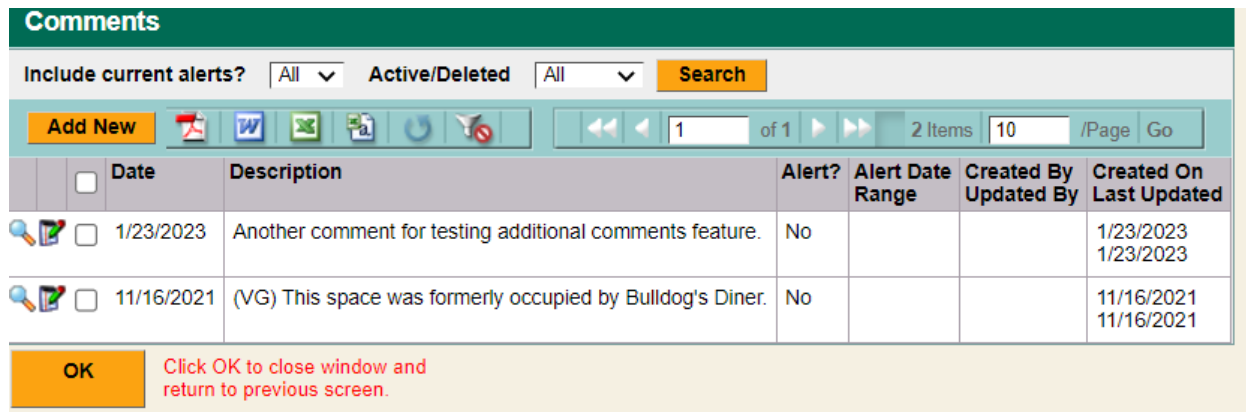
Comments are displayed as a part of the view establishment screen. If there is an alert related to the comment, a new window opens with the date, description, alert date range, Created By/Updated By, and Created On/Last Updated.



Click View Comments. Note that if multiple comments exist for the establishment red text will indicate that there are additional comments to view.

The user can perform multiple functions within the Comment alert screen including the following:

- Search for comments associated with the establishment.
- Select and Export comment.
- Add a new comment.
- View comment(s).
- Edit comment



To add a new comment:

1. Click on the Add New button.

WebEHRS opens a new window. To create a comment:

2. Enter a Comment Date (or accept the default of today's date).
3. Enter comment text for the Description.
4. Enter Alert From and To Dates (Optional).
5. Click the check box for Alert? (Optional).
6. Click on the Save button.

Add Comment

Comment Date

Add additional comments using this function. Comments will be saved to the establishment record. The comment date is automatically populated with today's date. However, the user can change the date if needed. Users may also add alters for the comment along with from and to dates.

Description

Alert From

Alert To

Alert?

To close the comment alert screen, click the OK button.

Comments

Include current alerts? Active/Deleted

1 of 1 1 Items 10 /Page Go


	Date	Description	Alert?	Alert Date Range	Created By Updated By	Created On Last Updated
<input type="checkbox"/>	5/19/2017	Test comment entered here.	Yes	5/18/2017 6/1/2017		5/19/2017 5/19/2017

Click OK to close window and return to previous screen.

7.3 EDIT ESTABLISHMENT

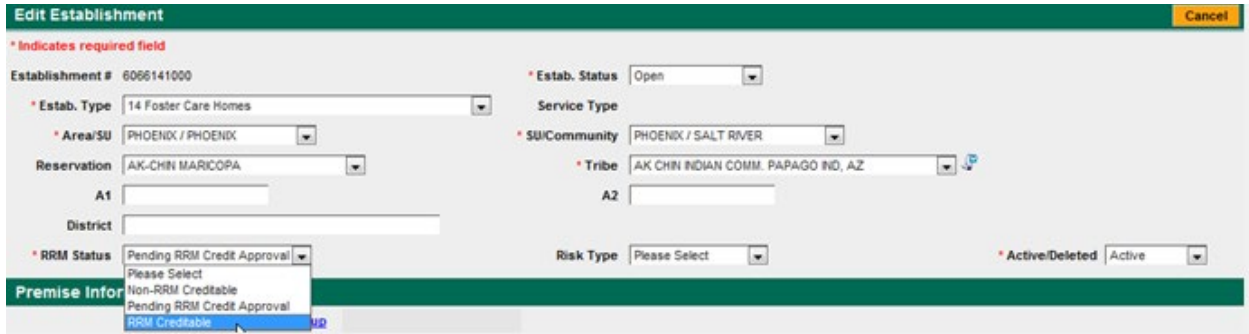
To edit an existing establishment:

1. Click on the Edit icon for the desired establishment.

Estab. # Estab. Type Permit #	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date	Google Map
6066141000 14 Foster Care Homes	GREAT PUMPKIN FOSTER CARE 5000 N CENTRAL AVE PHOENIX Arizona 56013	(502) 695-1999	5000 N CENTRAL AVE PHOENIX Arizona 56013	Active Open		

WebEHRS will open the Edit Establishment screen with data for the establishment populated. To edit the establishment, the user will:

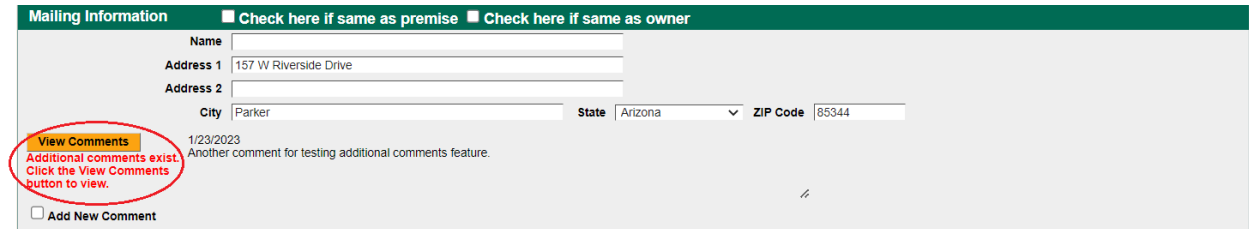
2. Enter corrections or additions by adding/editing text values or using the dropdown list and text boxes.



After the edits are completed, the user has options to view comments, save and return, or cancel.

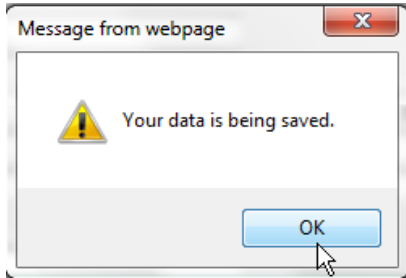


Note that if multiple comments have been entered for the establishment, red text will appear notifying the user that additional comments exist. To view all comments, click View Comments.



If the user selects Save and Return, WebEHRS saves the edits and returns to the Establishment Show Table Screen.

Note: If the system cannot save the changes immediately, WebEHRS displays a message window notifying the user that the edits are being saved. The user will not be able to leave this screen until the edits are saved or until the edits are canceled.



Close the box by clicking the OK button or the close window icon.

7.4 ADD ESTABLISHMENT

To add an Establishment from the Establishment Show Table screen:


1. Click on the Add New button .

7.4.1 BASE ESTABLISHMENT

A new screen is displayed for the user to add a new establishment. Required fields are indicated with a small (*) Asterisk. Enter required fields at a minimum.

1. Select Estabs. Status from the dropdown.
2. Select Estabs. Type from the dropdown.
3. Select Area/SU from the dropdown.
4. Select SU/Community from the dropdown.
5. Select Tribe from the dropdown.

A screenshot of the "Add Establishment" form in the Environmental Health Reporting System - WebEHRS. The header shows the system logo and the user name "User: Violet Gray". The form is titled "Add Establishment" and has a "Cancel" button in the top right. A red asterisk indicates required fields. The form contains several dropdown menus and text input fields: "Estab. Status" (Open), "Estab. Type" (49 Bingo Parlor / Gaming Facility), "Area/SU" (PHOENIX / PHOENIX), "SU/Community" (PHOENIX / PHOENIX), "Tribe" (AK CHR INDIAN COMM. PAPAGO IND, AZ), "Reservation" (Please Select), "A1" (text input), "A2" (text input), "District" (text input), "RRM Status" (Pending RRM Credit Approval), and "Risk Type" (Please Select). A mouse cursor is pointing at the "Estab. Status" dropdown.

Note: For Tribe and other dropdowns that contain an extensive list of values, an expanded dropdown list is available as indicated by the icon .

Note: The “RRM Status” field will default to “Pending RRM Credit Approval” for most users. Only users with privileges to approve/reject RRM Status will be allowed to change this value.

Users may also enter optional data for Reservation, A1, A2, District, and Risk Type.

7.4.2 PREMISE INFORMATION

After completing the basic information for adding an establishment, the user should add the Premise Information as shown below in the Premise Information section. Required fields are indicated by the small Asterisk (*) and include: Establishment Name, Address 1, City, State, Zip Code, and Primary Phone.

The "Check here if same as parent" function links a child facility to a parent facility. Checking this allows the establishment name, address, and phone information for the parent facility to populate in the child facility fields.

1. Enter information or select from dropdowns for all Required Fields.

Note: The system checks to make sure that the Zip Code and first six digits of the phone number are valid.

Premise Information Check here if same as parent

Parent Establishment [Lookup](#) [Unlink Relationship](#)

* Establishment Name

* Address 1

Address 2

* City * State Please Select * ZIP Code [Google Map Via Address](#)

* Primary Phone () - - Ext. Type Please Select Name

Alternate Phone () - - Ext. Type Please Select Name

Fax Number () - -

Email Address Website

Additional Emails [Add New](#) Email * Description * Mobile Rpts? Record Status

Latitude/ Longitude [Google Map via Coordinates](#) Land Status Please Select

GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Water Supply Please Select Liquid Waste Disposal Please Select

Solid Waste Method Please Select

Year Built Seasonal?

Smoke Free? If no, smoking policy in place? Description

Manager Name First Name Manager Name Last Name

Primary Phone () - - Ext. Type Please Select Name

Alternate Phone () - - Ext. Type Please Select Name

Certified Food Manager Employed? If yes, enter Certification #

Cert Food Mgr First Name Cert Food Mgr Last Name

Cert Food Mgr Expiration Date

Cert Food Mgr Phone () - - Ext. Type Please Select

Safety Officer First Name Safety Officer Last Name

Safety Officer Phone () - - Ext. Type Please Select

Safety Officer Email Address

Hours Of Operation

Next Survey Purpose Please Select Next Survey Date

Opening Date Closing Date Activity Due Date

Inactivate Date Reactivate Date

2. Enter additional Premise information as needed. (Optional)

7.4.2.1 PARENT ESTABLISHMENT

WebEHRS supports management of relationships between parent and child establishments. Users may assign an establishment to a parent on the Add or Edit Establishment screen. To support this action, the system provides an establishment look-up.

To select a parent:

1. Click on the [Lookup link](#).

Premise Information

Parent Establishment [Lookup](#) [Unlink Relationship](#)

* Establishment Name

* Address 1

Address 2

* City * State * ZIP Code [Google Map Via Address](#)

* Primary Phone Ext. Type Name

Alternate Phone () - - Ext. Type Please Select Name

Fax Number () - -

WebEHRS opens a new window for the user to search and select an establishment.

2. Use Filters to locate the desired establishment.
3. Click on the Select link to select a Parent Establishment.

Establishment Lookup

Use the fields below for ad-hoc filtering. Select an Establishment record or click on the red X to close this window.

Estab. Name containing test facility

Areas/SU's: All, ALASKA / ANCHORAGE, ALASKA / ANNETTE ISLAND, ALASKA / BARROW. Apply Areas button.

Reservations: All, ACOMA, AK-CHIN MARICOPA, ALABAMA COUSHATTA LIVINGSTON TEXAS.

Tribes: [Empty]

Service Type: All

Active/Deleted: All

Additional Search Options

RRM Status: All, Risk Type: All, Establishment #: [Empty], Estab. Status: All

A1: [Empty], A2: [Empty], District: [Empty], Search, Clear buttons.

Name	Estab. Type	Address 1	City / ST / ZIP
Select Test Facility Food Service	47 Cafe/Restaurant	1234 Brown Street	Rhinelanders Wisconsin 54501

Once the selection is made, WebEHRS closes the lookup window and returns the user to the Add or Edit Establishment screen.

4. Click the Save and Return button.

Premise Information

Parent Establishment: Test Facility Food Service [Unlink Relationship](#)

* Establishment Name: KENNY'S TEST CAFE

* Address 1: 123 DOES NOT EXIST STREET

Address 2: [Empty]

* City: PHOENIX * State: Arizona * ZIP Code: 85004 [Google Map Via Address](#)

* Primary Phone: (602) 364-5078 Ext. [Empty] Type: Work Name: [Empty]

Alternate Phone: () - - - - Ext. [Empty] Type: Please Select Name: [Empty]

Fax Number: () - - - -

Email Address: [Empty] Website: [Empty]

Latitude/ Longitude: [Empty] [Google Map via Coordinates](#) Land Status: Please Select

GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Water Supply: Please Select Liquid Waste Disposal: Please Select

Solid Waste Method: Please Select

Year Built: [Empty] Seasonal?: Please Select

Smoke Free?: [Empty]

Note: Any Owner and Mailing Information associated with the Parent will populate into those respective fields for the child establishment.

Parent/Child relationships can be unlinked from the Add or Edit Establishment screen. To unlink a relationship:

1. Click on the [Unlink Relationship link](#).
2. Click on the Save and Return button to save the change.

Note: Owner and Mailing Information, that was previously copied from the Parent Establishment, will remain even after the Parent Establishment is “unlinked” from this child record.

Premise Information

Parent Establishment [Test Facility Food Service](#) [Unlink Relationship](#)

* Establishment Name KENNY'S TEST CAFE

* Address 1 123 DOES NOT EXIST STREET

Address 2

* City PHOENIX * State Arizona * ZIP Code 85004 [Google Map Via Address](#)

* Primary Phone ((602) 364-5078 Ext. Type Work Name

Alternate Phone Ext. Type Please Select Name

Fax Number

Email Address Website

Latitude/ Longitude [Google Map via Coordinates](#) Land Status Please Select

GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Water Supply Please Select Liquid Waste Disposal Please Select

Solid Waste Method Please Select

Year Built Seasonal? Please Select

Smoke Free?

7.4.3 ADDITIONAL EMAILS

To add additional emails to an establishment, click the “Add New” button in the Additional Emails panel.

Premise Information Check here if same as parent

Parent Establishment [Lookup](#) [Unlink Relationship](#)

* Establishment Name

* Address 1

Address 2

* City * State Please Select * ZIP Code [Google Map Via Address](#)

* Primary Phone Ext. Type Please Select Name

Alternate Phone Ext. Type Please Select Name

Fax Number

Email Address Website

Additional Emails [Add New](#) Email * Description * Mobile Rpts? Record Status

A new row will display to add an email address. Email and Description are required fields. The Email must be in a proper email format of xxxxx@xxx.com. Optionally, Mobile Rpts may be selected.

Additional Emails	Add New	Email *	Description *	Mobile Rpts?	Record Status
	X	sampleemail@cdpehs.com	Sample Email	<input type="checkbox"/>	Active

Repeat the steps to add more additional emails. If an email was entered incorrectly, clicking the red X will remove the entry. These additional emails will be available on the mobile inspection entry page.

7.4.4 OWNER INFORMATION AND MAILING INFORMATION

WebEHRS provides Owner and Mailing address fields to capture additional establishment demographics. Owner and Mailing fields are optional.

Note: If the information is the same or similar to the Premise Information, the user can copy the information by using the “**Check here if same as premise**” checkboxes. To copy the information from Premise:

1. Click in check box on the Owner Information shaded panel bar.
2. Click in check box on the Mailing Information shaded panel bar.

The screenshot displays two sections of a form: "Owner Information" and "Mailing Information". Both sections have a green header bar with a checkbox labeled "Check here if same as premise". In the "Owner Information" section, the checkbox is circled in red. The form fields include: Name, Corporate Name (SUN VALLEY RESORT AND CASINO), Address 1 (4400 N CENTRAL AVE), Address 2, City (PHOENIX), State (Arizona), ZIP Code (85013), Primary Phone ((502) 695-1999), Ext, Type (Premise), Name, Alternate Phone, Ext, Type (Please Select), Name, Fax Number, and Email Address. The "Mailing Information" section also has a red circle around its "Check here if same as premise" checkbox. Below it are fields for Name, Address 1 (4400 N CENTRAL AVE), Address 2, City (PHOENIX), State (Arizona), and ZIP Code (85013). At the bottom of the form, there are buttons for "View Comments", "Add New Comment", "Save & Return", and "Cancel".

7.4.5 SUPPLEMENTAL INFORMATION

The Establishment Module allows users to "Save & Continue" to access the Supplemental Information screen for some establishment types. The "Save & Continue" button will only show for the following Establishment Types: 01, 02.1, 02.2, 02.3, 02.4, 03.1, 03.2, 04, 05, 06, 08, 15.1, 15.2, 16, 20, 21, 12, 13, 22.1, 22.2, 23, 26, 27, 28, 29, 30, 32.1, 32.2, 33, 34, 44, 49, 50, 56, 57 and 58.

Note: The "Save & Continue" button and associated explanatory text ("Click SAVE & CONTINUE...") is hidden when the Establishment Type does not capture Supplemental Information.

To enter supplemental information:

1. Click on the Save and Continue button.

WebEHRS provides a screen for the user to enter supplemental Information.

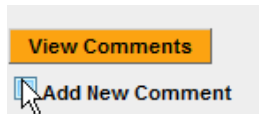
Supplemental Info

Estab. Engineer Name(F/L)	<input type="text"/>		
Estab. Engineer Phone	<input type="text"/> () - - -	Ext <input type="text"/>	Type <input type="text" value="Please Select"/>
Infection Control Officer Name(F/L)	<input type="text"/>		
Infection Control Officer Phone	<input type="text"/> () - - -	Ext <input type="text"/>	Type <input type="text" value="Please Select"/>
Occupancy Class	<input type="text" value="Please Select"/>	Click here for Occupancy Classification Comparison Table	
Operator	<input type="text" value="Please Select"/>		
Facility Accreditation	<input type="text" value="Please Select"/>		
Health Center Director Name(F/L)	<input type="text"/>		
Health Center Director Phone	<input type="text"/> () - - -	Ext <input type="text"/>	Type <input type="text" value="Please Select"/>
CEO Name(F/L)	<input type="text"/>		
CEO Phone	<input type="text"/> () - - -	Ext <input type="text"/>	Type <input type="text" value="Please Select"/>

Save and Return
Cancel

7.4.6 ADD COMMENTS FOR ESTABLISHMENTS

Users can add comments for establishments.



To add a comment:

1. Click in the checkbox beside Add New Comment.
2. Accept the default of date and time or change to alternative.
3. Enter text for comment.
4. The Spell Check feature can be used to check the spelling of the comment (optional).

Note that if multiple comments have been entered for the establishment, red text will appear notifying the user that additional comments exist. To view all comments, click View Comments.

Mailing Information Check here if same as premise Check here if same as owner



Name	<input type="text"/>		
Address 1	<input type="text" value="157 W Riverside Drive"/>		
Address 2	<input type="text"/>		
City	<input type="text" value="Parker"/>	State <input type="text" value="Arizona"/>	ZIP Code <input type="text" value="85344"/>



1/23/2023
Another comment for testing additional comments feature.

View Comments
Additional comments exist. Click the View Comments button to view.

Add New Comment

Add New Comment

Comment Date: 05/19/2017  Time: 11:31 AM 

Alert? Alert Effective From:  To: 

Adding a test comment for an establishment.

[Spell Check](#)

(Maximum characters: 4000)
You have characters left.

Save & Return **Cancel**


After the comment entry is complete, save the comment to the Establishment by:

5. Click the Save & Return button at the bottom of the screen.

7.5 COPY ESTABLISHMENT

WebEHRS allows a user to copy an existing establishment to create a new establishment. To copy an establishment:

1. Use the Search Filters to locate the establishment to copy.
2. Use the checkbox to select the desired establishment from the Show Table panel.
3. Click the Copy button.

Add New Copy Attachments									
Surveys R/C/P Activities Child Relationships Parent Relationships Edit Supplemental Comments Letters App Surv Hist Audit									
Estab. #	Estab. Type	Premise Name	Primary Phone	Owner Name	Active/Deleted	EHS	Created By	Created On	Google
Tribe		Address	Alt. Phone	Address	Risk Type	Last Survey Date	Updated By	Last Updated	Map
		City/ST/ZIP	Email	City/ST/ZIP	Estab. Status	Permit #			
<input checked="" type="checkbox"/>	6000470001	47 Cafe/Restaurant	(602) 364-5078	123 DOES NOT EXIST	Active	Kenny Hicks	khicks	8/13/2013	
	AK CHIN INDIAN COMM. PAPAGO	123 DOES NOT EXIST		STREET	Category I -	2/14/2014	JGrady	5/19/2017	
	IND, AZ	PHOENIX Arizona 85004		PHOENIX Arizona 85004	High				
					Open				

WebEHRS opens a new add establishment screen displaying the information for the selected establishment. To create the new establishment:

4. Modify any fields if necessary.
5. Change the Establishment Name.
6. Enter additional data as needed (optional).
7. Click Save and Return or Save and Continue (if supplemental information is needed).

If the user does not change the establishment name, the system prompts the user with an error message.

7.6 ATTACHMENTS BUTTON

The Attachments button allows the user to view attachments associated with a selected establishment. To use the Attachments button:

1. Use the checkbox to select the desired establishment from the Show Table panel.
2. Click the Attachments button.

Surveys	R/C/P	Activities	Child Relationships	Parent Relationships	Edit Supplemental	Comments	Letters	App	Surv Hist	Audit
<input type="checkbox"/>	Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map	
<input checked="" type="checkbox"/>	6000470001 47 Cafe/Restaurant AK CHIN INDIAN COMM. PAPAGO IND, AZ	KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX Arizona 85004	(602) 364-5078	123 DOES NOT EXIST STREET PHOENIX Arizona 85004	Active Category I - High Open	2/14/2014		8/13/2013 5/19/2017		

WebEHRS opens a pop-up window and displays the establishment name, address, establishment type, and any existing attachments for the selected establishment.

Establishment

Name/Address	Establishment Type
KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX, Arizona 85004	47 Cafe/Restaurant

Attachments

Active/Deleted: ACTIVE Search Clear

Upload

File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
0 of 0 0 Items 10 /Page Go				

To upload a new attachment:

1. Click the Upload button.
2. Use the Browse button to search for the desired file.
3. Select a Document Type from the drop-down menu.
4. Click Save and Upload.

Attachment Upload

* Indicates required field

Please remember that excessively large files can take a long time to load.
Click the Browse button below to select your file.

* File Name Browse...

* Document Type Please Select ▼

Save and Upload
Cancel

The new attachment displays with the file name, document type, created on/last updated dates, updated by, and active/deleted status.


Establishment

Name/Address KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX, Arizona 85004	Establishment Type 47 Cafe/Restaurant
---	---

Attachments

Active/Deleted: ACTIVE [v] Search Clear

Upload [w] [x] [y] [z] [1] of 1 1 Items 10 /Page Go

File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
 Test Attachment.docx	Assessments	5/23/2017 / 5/23/2017		ACTIVE

To update or modify (replace) the attachment:

1. Click the Edit record  icon.

Update/Modify Attachment

* Indicates required field

This allows you to update/modify the information in this pop-up. You cannot edit the document itself, but you can replace the document. Please remember that excessively large files can take a long time to load.

Click the Browse button below to select your file.

File Name Browse...

Current File Name Test Attachment.docx

* Document Type Assessments [v]

* Active/Deleted ACTIVE [v]

Save and/or Upload Cancel

The document type and active/delete status can be modified, but the document itself cannot be edited; only replaced with a new document.

2. Click Save and/or Upload or Cancel without saving.

7.7 SURVEYS BUTTON

The Surveys button allows the users to view surveys associated with the selected establishment. To use the Surveys button:

1. Use the checkbox to select the desired establishment from the Show Table panel.
2. Click the Surveys button.

Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map
<input checked="" type="checkbox"/> 6000470001 47 Cafe/Restaurant AK CHIN INDIAN COMM. PAPAGO IND, AZ	KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX Arizona 85004	(602) 364-5078	123 DOES NOT EXIST STREET PHOENIX Arizona 85004	Active Category I - High Open	Kenny Hicks 2/14/2014		8/13/2013 5/19/2017	

WebEHRS displays a screen from the Survey Module. The screen displays the name, address, establishment type, and next survey due in the establishment panel. Survey history (if any) is displayed in the Survey History panel, including: survey date, survey purpose, EHS, survey status, date finalized, critical viols found, R/C/P title, survey type, origin, create/update user, setup/update dates, and active/deleted status. If there are no previous surveys, no surveys will be shown.

Name/Address	Establishment Type	Next Survey Due
KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX, Arizona 85004	47 Cafe/Restaurant	8/14/2014

Survey Date	Survey Purpose	EHS	Survey Status	Date Finalized	Critical Viols Found	R/C/P Title	Survey Type	Origin	Create User Update User	Setup Date Update Date	Active/Deleted

Adding new surveys is addressed in the Survey Module section of this User Guide.

To return to the establishments screen:

3. Click the Return to Establishments button.

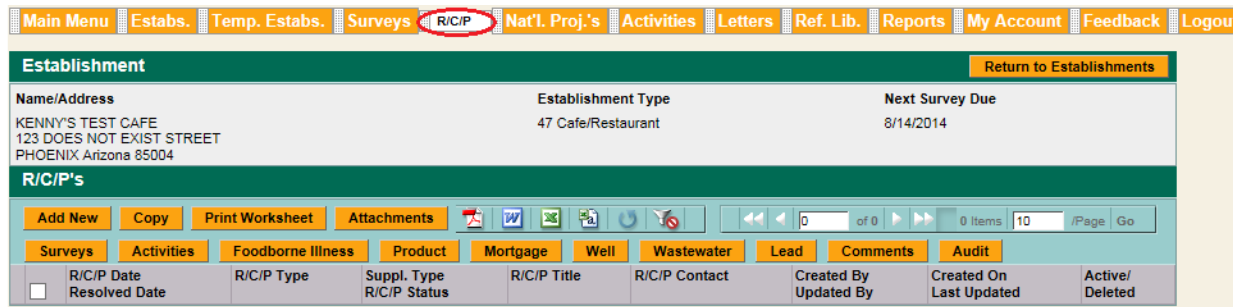
7.8 R/C/P BUTTON

The R/C/P button allows the user to view requests, complaints, and projects associated with the selected establishment. To use the R/C/P button:

1. Use the checkbox to select the desired establishment from the Show Table panel.
2. Click the R/C/P button.

Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map
<input checked="" type="checkbox"/> 6000470001 47 Cafe/Restaurant AK CHIN INDIAN COMM. PAPAGO IND, AZ	KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX Arizona 85004	(602) 364-5078	123 DOES NOT EXIST STREET PHOENIX Arizona 85004	Active Category I - High Open	2/14/2014		8/13/2013 5/19/2017	

WebEHRS displays a screen from the R/C/P module. The screen includes the name, address, establishment type, and next survey date in the establishment panel. The R/C/P panel includes R/C/Ps related to the selected establishment and functionality to perform tasks related to R/C/Ps such as add new, copy, and many others.



Adding a new R/C/P and using the other functions are addressed in the R/C/P module section of this User Guide.

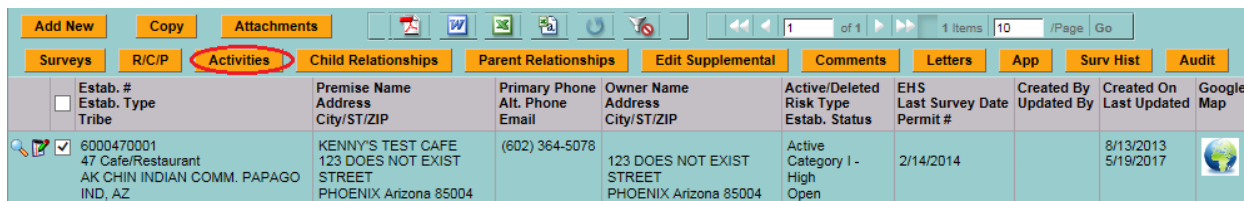
To return to the establishment module:

4. Click on the Return to Establishments button.

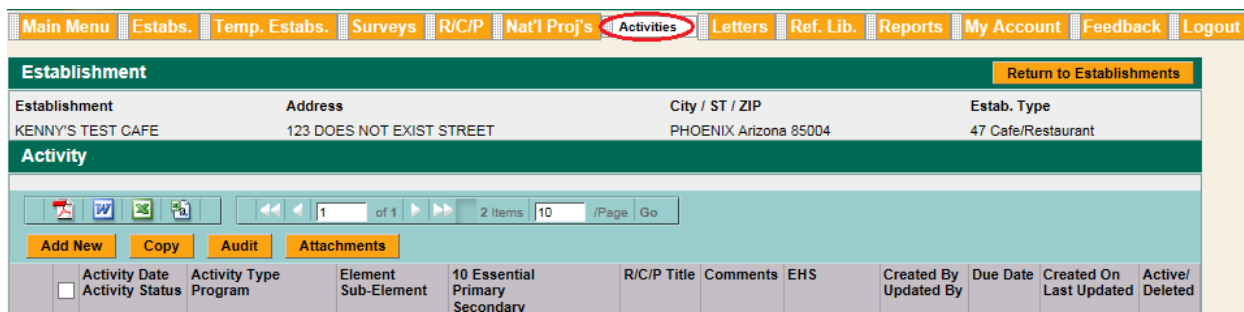
7.9 ACTIVITIES BUTTON

The Activities button allows the user to view activities associated with the selected establishment. To use the Activities button:

1. Use the checkbox to select the desired establishment from the Show Table panel.
2. Click the Activities button.



WebEHRS displays a screen from the Activities module. The screen displays the name, address, and establishment type in the establishment panel and related activities in the activities panel.



Adding new Activities and other functions for activities are addressed in the Activities module section of this User Guide.

To return to the establishment module:

3. Click on the Return to Establishments button.

7.10 EDIT SUPPLEMENTAL INFO

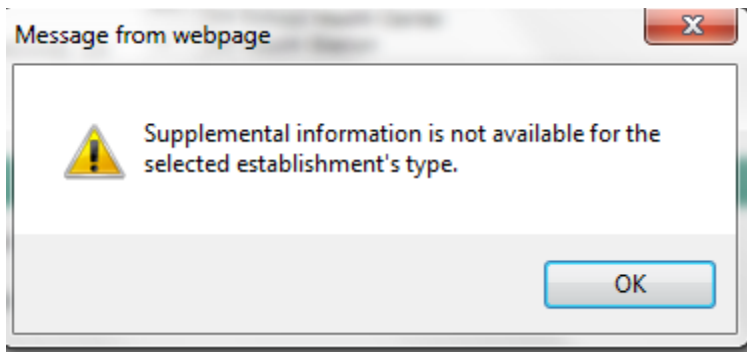
The Edit Supplemental Info button allows the user to add supplemental information associated with the selected establishment. To use the Edit Supplemental Info button:

1. Use the checkbox to select the desired establishment from the Show Table panel
2. Click on the Edit Supplemental Info button.

Estab. #	Estab. Type	Tribe	Premise Name	Address	City/ST/ZIP	Primary Phone	Alt. Phone	Email	Owner Name	Address	City/ST/ZIP	Active/Deleted	Risk Type	Estab. Status	EHS Last Survey Date	Permit #	Created By	Updated By	Created On	Last Updated	Google Map			
6000470001	47 Cafe/Restaurant	AK CHIN INDIAN COMM. PAPAGO	KENNY'S TEST CAFE	123 DOES NOT EXIST	STREET	PHOENIX	Arizona	85004	(602) 364-5078	123 DOES NOT EXIST	STREET	PHOENIX	Arizona	85004	Active	Category I - High	Open			2/14/2014		8/13/2013	5/19/2017	

If the establishment type qualifies for adding supplemental information, the system displays a screen for the user to enter information. The establishment types that allow supplemental information to be added include: 01, 02.1, 02.2, 02.3, 02.4, 03.1, 03.2, 04, 05, 06, 08, 15.1, 15.2, 16, 20, 21, 12, 13, 22.1, 22.2, 23, 26, 27, 28, 29, 30, 32.1, 32.2, 33, 34, 44, 49, 50, 56, 57 and 58.

If the selected establishment does not allow Supplemental Information to be captured, WebEHRS displays a warning message.



If the establishment type has supplemental information, the screen displays the name, area, service unit, establishment type, and establishment number in the establishment panel. The supplemental information panel displays supplemental information associated with the establishment and/or allows the user to enter or edit information.

Note: Supplemental information is variable depending on the type of establishment. All supplemental information is optional.

To edit or add supplemental information:

3. Enter information.
4. Click the Save and Return button.

Edit Establishment Cancel

Estab. Name	Peanuts Comprehensive Health Care		Area	PHOENIX	Service Unit	PHOENIX
Estab. Type	01 Comprehensive Health Care Referral Facility		Establishment #	606611000		

Supplemental Info

Estab. Engineer Name(F/L)	Arron	VanPelt	
Estab. Engineer Phone	(888) 237-4814	Ext	Type Work
Infection Control Officer Name(F/L)	Lucy	Gray	
Infection Control Officer Phone	(888) 237-4814	Ext	Type Premise
Occupancy Class	Healthcare Occupancy	Click here for Occupancy Classification Comparision Table	
Operator	IHS		
Facility Accreditation	Please Select		
Health Center Director Name(F/L)			
Health Center Director Phone	() - -	Ext	Type Please Select
CEO Name(F/L)			
CEO Phone	() - -	Ext	Type Please Select

Save and Return
Cancel

To return to the establishment module without saving additions or edits for the supplemental information:

5. Click the Cancel button.

7.11 CHILD RELATIONSHIPS BUTTON

The Child Relationships button allows the user to view and edit information including children establishments associated with the selected establishment. To use the Child Relationship button:

1. Use the checkbox to select the desired **parent** establishment from the Show Table panel.
2. Click the Child Relationships button.

Estab. #	Estab. Type	Tribe	Premise Name	Address	City/ST/ZIP	Primary Phone	Alt. Phone	Email	Owner Name	Address	City/ST/ZIP	Active/Deleted	Risk Type	Estab. Status	EHS	Last Survey Date	Permit #	Created By	Updated By	Created On	Last Updated	Google	Map
6000470001	47 Cafe/Restaurant		KENNY'S TEST CAFE	123 DOES NOT EXIST STREET	PHOENIX Arizona 85004	(602) 364-5078			123 DOES NOT EXIST STREET	PHOENIX Arizona 85004		Active	Category I - High	Open		2/14/2014				8/13/2013	5/19/2017		

WebEHRS displays a screen with information about the Parent/Child relationships. The screen displays the name, area, service unit, address, and establishment number for the Parent in the establishment panel. Information about all associated children will be displayed in the Child panel. The user can edit the establishment including unlinking child establishments.

To view the child establishment information:

3. Click on the magnify icon.

To edit the child establishment:

4. Click on the edit icon.

To unlink a child establishment:

5. Click on the Unlink button.

Establishment Parent/Child Links						Return to Establishments
Name	SUN VALLEY RESORT AND CASINO		Area	PHOENIX	Service Unit	PHOENIX
Estab. Type	49 Bingo Parlor / Gaming Facility		Establishment #	6066491000		
Address 1	4400 N. CENTRAL AVE					
Address 2						
City	PHOENIX	State	Arizona	ZIP	85013	
Associated Child Establishment(s)						
Click on the Unlink button to the right of the Establishment to remove the Parent-Child relationship. These must be done one at a time. Each Unlink function will refresh this page.						
NOTE: Removing the Parent-Child relationship will NOT delete the Establishment.						
Establishment #	Name/ Address	Estab. Type	Areas	Service Units	Setup Date	Last Update
6066471000	SNOPPY'S CAFE 4400 N. CENTRAL AVE PHOENIX Arizona 85013	47 Cafe/Restaurant	PHOENIX	PHOENIX	11/17/2011	11/30/2011
6066321000	SUN VALLEY RESORT AND CASINO HOTEL 4400 N. CENTRAL AVE PHOENIX Arizona 85013	32.2 Motel/Hotel	PHOENIX	PHOENIX	11/17/2011	11/30/2011
						Unlink

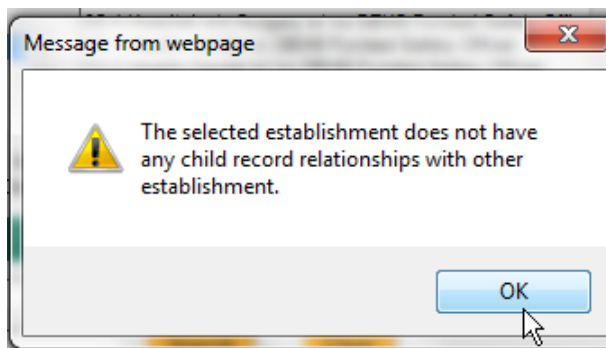
To return to the Establishment Show Table Screen:

6. Click on the Return to Establishments button.

If the user selects an establishment that is not linked as a parent establishment, WebEHRS notifies the user with a pop-up message.

To close the message window:

7. Click on the OK button.



7.12 PARENT RELATIONSHIPS BUTTON

The Parent Relationships button also allows the user to view and edit information including child establishments associated with the Parent. To use the Parent Relationship button:

1. Use the checkbox to select the desired **child** establishment from the Show Table panel.
2. Click on the Parent Relationships button.

Add New Copy Attachments Print Word Excel PDF Refresh Close 1 of 1 1 Items 10 /Page Go										
Surveys R/C/P Activities Child Relationships Parent Relationships Edit Supplemental Comments Letters App Surv Hist Audit										
	Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map	
<input checked="" type="checkbox"/>	6000470001 47 Cafe/Restaurant AK CHIN INDIAN COMM. PAPAGO IND, AZ	KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX Arizona 85004	(602) 364-5078	123 DOES NOT EXIST STREET PHOENIX Arizona 85004	Active Category I - High Open	2/14/2014		8/13/2013 5/19/2017		

The system will display a screen with information about the Parent/Child relationships. The screen will display the name, area, service unit, address, and establishment number for the Parent in the establishment panel. Information about all associated children will be displayed in the Child panel. The user may edit the establishment including unlinking child establishments.

- To view the child establishment information, click the magnify icon.
- To edit the child establishment, click the edit icon.
- To unlink the child establishment, click the Unlink button.

Establishment Parent/Child Links
Return to Establishments

Name	SUN VALLEY RESORT AND CASINO HOTEL	Area	PHOENIX	Service Unit	PHOENIX
Estab. Type	32.2 Motel/Hotel	Establishment #	6066321000		
Address 1	4400 N. CENTRAL AVE				
Address 2					
City	PHOENIX	State	Arizona	ZIP	85013

Associated Child Establishment(s)

Click on the Unlink button to the right of the Establishment to remove the Parent-Child relationship. These must be done one at a time. Each Unlink function will refresh this page.
 NOTE: Removing the Parent-Child relationship will NOT delete the Establishment.

Establishment #	Name/ Address	Estab. Type	Areas Service Units	Setup Date Last Update	
6066421000	SNOPPY'S BAKER AND COFFEE SHOP 4400 N CENTRAL AVE PHOENIX Arizona 85013	42 Bakery, Cannery, Bottling	PHOENIX PHOENIX	11/17/2011 11/30/2011	Unlink

To return to the Establishment Show Table screen:

3. Click on the Return to Establishments button.

7.13 AQUATIC VENUES BUTTON

To support facilities with multiple pools or aquatic venues, establishment type “55” has been replaced with two new types: **55.1 – Small Aquatic Facilities** (1–4 aquatic venues) and **55.2 – Large Aquatic Facilities** (5 or more aquatic venues).

All pools at a single location are consolidated under **one parent establishment**, with each pool represented as an individual **aquatic venue**.

The **Aquatic Venues** button allows users to view, add, and edit aquatic venues associated with a pool establishment.

To use the Aquatic Venues button:

1. Use the checkbox to select the desired pool establishment from the Show Table panel.
2. Click the **Aquatic Venues** button.

Add New
Copy
Attachments

1 of 4
36 Items
10 / Page

Surveys
R/C/P
Activities
Child Relationships
Parent Relationships
Aquatic Venues
Edit Supplemental
Comments
Letters
App
Surv Hist
Audit

	Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	
	<input checked="" type="checkbox"/> 7086556080 55.1 Small Aquatic Facilities COW CREEK BAND UMPQUA INDIANS, OR	7 FEATHERS SWIMMING POOLS 8937490128 roseburg Oregon 98237	(293) 874-9218		Active Category II - Medium Open	Timmy Feltenberger 10/26/2025	TFeltenberger	1/1/1900 11/4/2025	

WebEHRS displays a screen listing the pool establishment type and all aquatic venues associated with the establishment. For each aquatic venue, the following information is shown: the venue description, its operational status, its active or deleted status, the setup date, and the user who created the record.

Establishment Return

Premise Name 7 FEATHERS SWIMMING POOLS	Premise Address 1 8937490128	City / ST / ZIP roseburg, Oregon 98237	Establishment Type 55.1 Small Aquatic Facilities ▼
--	--	--	---

Aquatic Venues

* Indicates required field Active/Deleted Active ▼

Add New
↻
✖

* Description	* Operation Status	* Active/Deleted	Setup Date Update Date	Update User	File ID
Hot Tub	Open ▼	Active ▼	10/20/2025 2/4/2026	Feltenberger, Timmy	84
Lap Pool	Open ▼	Active ▼	10/2/2025 2/4/2026	Feltenberger, Timmy	31
Water Slide	Open ▼	Active ▼	10/20/2025 2/4/2026	Feltenberger, Timmy	85

Save & Return
Cancel

To add an Aquatic Venue:

1. Click on **Add New** button.
2. Type the description of the aquatic venue.
3. Select the **Operation Status** of the aquatic venue using the drop-down list.
The **Setup/Update** date and **Update User** fields will automatically populate.
4. Click the **Save & Return** button after all the information has been entered.

Establishment Return

Premise Name 7 FEATHERS SWIMMING POOLS	Premise Address 1 8937490128	City / ST / ZIP roseburg, Oregon 98237	Establishment Type 55.1 Small Aquatic Facilities ▼
--	--	--	---

Aquatic Venues

* Indicates required field Active/Deleted Active ▼

Add New
↻
✖

* Description	* Operation Status	* Active/Deleted	Setup Date Update Date	Update User	File ID
✖ <input style="width: 90%; border: 1px solid black;" type="text"/>	Please Select ▼	Active ▼			
Hot Tub	Open ▼	Active ▼	10/20/2025 2/4/2026	Feltenberger, Timmy	84
Lap Pool	Open ▼	Active ▼	10/2/2025 2/4/2026	Feltenberger, Timmy	31
Water Slide	Open ▼	Active ▼	10/20/2025 2/4/2026	Feltenberger, Timmy	85

Save & Return
Cancel

Establishment Type Validation:

- Select **55.1 – Small Aquatic Facilities** when the establishment has **four or fewer venues**.
- Select **55.2 – Large Aquatic Facilities** when the establishment has **five or more venues**.

In the example below, two venues (“Hot Tub 2” and “Hot Tub 3”) were added, bringing the total to **five venues**. Since the establishment type was not changed to **Large Aquatic Facilities**, the system displays the following validation error:

Establishment						Return
Premise Name	Premise Address 1	City / ST / ZIP	Establishment Type			
7 FEATHERS SWIMMING POOLS	8937490128	roseburg, Oregon 98237	55.1 Small Aquatic Facilities			
Aquatic Venues						
* Indicates required field						
Active/Deleted	Active					
Add New						
* Description	* Operation Status	* Active/Deleted	Setup Date	Update Date	Update User	File ID
✗ Hot Tub 3	Open	Active				
✗ Hot Tub 2	Open	Active				
Hot Tub	Open	Active	10/20/2025	2/4/2026	Feltenberger, Timmy	84
Lap Pool	Open	Active	10/2/2025	2/4/2026	Feltenberger, Timmy	31
Water Slide	Open	Active	10/20/2025	2/4/2026	Feltenberger, Timmy	85

This establishment is type 55.1 (1-4 venues) and has a total of 5 venue(s). Please update the establishment type to 55.2



7.14 COMMENTS

The Comments button allows the user to view, edit, and add comments for the selected establishment. To use the Comments button:

1. Use the checkbox to select the establishment from the **Show Table** panel.
2. Click the **Comments** button.

Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map
6000470001 47 Cafe/Restaurant AK CHIN INDIAN COMM. PAPAGO IND, AZ	KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX, Arizona 85004	(602) 364-5078	123 DOES NOT EXIST STREET PHOENIX, Arizona 85004	Active Category I - High Open	2/14/2014		8/13/2013 5/19/2017	

WebEHRS displays a screen with information about the comments associated with the selected establishment. Information for comments includes the date the comment was created, a description (if applicable), alert information (if applicable), and the created by and update.

Comments

Include current alerts? All Active/Deleted All Search

Add New

Date	Description	Alert?	Alert Date Range	Created By Updated By	Created On Last Update
<input type="checkbox"/>					

OK
Click OK to close window and return to previous screen.

To add a comment:

1. Click the **Add New** button.
2. Accept the default of date and time or change to alternative.
3. Type the comment in the **Description** field.
4. Specify an **Alert From** and **Alert To** date range (optional).
5. Select the **Alert?** check box(optional).
6. Click **Spell Check** feature to check the spelling of the comment (optional).

Add Comment

Comment Date 5/19/2017 (12)

Description [Spell Check](#)

(Maximum characters: 4000)
You have 4000 characters left.

Alert From (12)

Alert To (12)

Alert?

Save
Cancel

To save the comment, click the **Save** button.

WebEHRS refreshes the comments screen with the new comment and/or any edits that are made for existing comments.

Comments

Include current alerts? All Active/Deleted All

1 of 1 3 Items 10 /Page Go

<input type="checkbox"/>	Date	Description	Alert?	Alert Date Range	Created By Updated By	Created On Last Updated
<input type="checkbox"/>	5/19/2017	test comment	No			5/19/2017 5/19/2017

Click OK to close window and return to previous screen.

To return to the Establishment Show Table screen, click the OK button.

7.15 LETTERS BUTTON

The Letters button allows the users to view letters for the selected establishment. To use the Letters button:

1. Use the checkbox to select the desired establishment from the Show Table panel.
2. Click the Letters button.

1 of 1 1 Items 10 /Page Go

<input type="checkbox"/>	Estab. # Estab. Type Tribe	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone Email	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date Permit #	Created By Updated By	Created On Last Updated	Google Map
<input checked="" type="checkbox"/>	6000470001 47 Cafe/Restaurant AK CHIN INDIAN COMM. PAPAGO IND, AZ	KENNY'S TEST CAFE 123 DOES NOT EXIST STREET PHOENIX Arizona 85004	(602) 364-5078	123 DOES NOT EXIST STREET PHOENIX Arizona 85004	Active Category I - High Open	2/14/2014		8/13/2013 5/19/2017	

WebEHRS displays a screen from the Letters module. The screen displays the establishment name, address, and establishment type in the establishment panel. Letters (if any) are displayed in the Letter Master panel.

Establishment

Estab. Name/Address
SNOPPY'S BAKER AND COFFEE SHOP
4400 N CENTRAL AVE
PHOENIX Arizona 85013

Establishment Type
42 Bakery, Cannery, Bottling

Letter Master

1 of 1 1 Items 10 /Page Go

<input type="checkbox"/>	Letter Type	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
<input checked="" type="checkbox"/>	IHS EH Survey Contact Letter	Letter text This is the first letter sent to this establishment. Follow-up may be required.	VGray VGray	11/29/2011 11/29/2011	Active

Information about viewing letters, adding new letters, and other functions for Letters is provided in the Letter Module section of this User Guide. To return to the Establishments Module:

3. Click on the Return to Establishments button.

7.16 APP BUTTON

The App button allows users to view the application for a selected establishment. To view the application for permit:

1. Use the checkbox to select the desired establishment from the Show Table panel.
2. Click the App button.


The screenshot shows a software interface with a toolbar at the top containing buttons for 'Add New', 'Copy', 'Attachments', and various icons. Below the toolbar is a row of tabs: 'Surveys', 'R/C/P', 'Activities', 'Child Relationships', 'Parent Relationships', 'Edit Supplemental', 'Comments', 'Letters', 'App' (circled in red), 'Surv Hist', and 'Audit'. Below the tabs is a table with the following columns: 'Estab. #', 'Estab. Type', 'Tribe', 'Premise Name', 'Address', 'City/ST/ZIP', 'Primary Phone', 'Alt. Phone', 'Email', 'Owner Name', 'Address', 'City/ST/ZIP', 'Active/Deleted', 'Risk Type', 'Estab. Status', 'EHS Last Survey Date', 'Permit #', 'Created By', 'Updated By', 'Created On', 'Last Updated', and 'Google Map'. One row is selected, showing details for establishment 6000470001.

Estab. #	Estab. Type	Tribe	Premise Name	Address	City/ST/ZIP	Primary Phone	Alt. Phone	Email	Owner Name	Address	City/ST/ZIP	Active/Deleted	Risk Type	Estab. Status	EHS Last Survey Date	Permit #	Created By	Updated By	Created On	Last Updated	Google Map
6000470001	47 Cafe/Restaurant	AK CHIN INDIAN COMM. PAPAGO IND, AZ	KENNY'S TEST CAFE	123 DOES NOT EXIST STREET	PHOENIX, Arizona 85004	(602) 364-5078			123 DOES NOT EXIST STREET	PHOENIX, Arizona 85004		Active	Category I - High	Open	2/14/2014				8/13/2013	5/19/2017	

WebEHRS displays a pop-up window with the application for health permit for viewing or printing.

Parameters Group Tree 1 / 1 80% CRYSTAL REPORTS 2008

Main Report



Indian Health Service

APPLICATION FOR HEALTH PERMIT

The undersigned hereby makes application for a permit to operate a food establishment and/or retail food store in the

NAME OF ESTABLISHMENT: KENNY'S TEST CAFE

ADDRESS: 123 DOES NOT EXIST STREET PHOENIX 85004
(Street) (City) (Zip)

PHONE: (602) 364-5078 FAX: _____

EMAIL: _____

OWNER: _____ PHONE: (602) 364-5078

ADDRESS: 123 DOES NOT EXIST STREET PHOENIX 85004
(Street) (City) (Zip)

MANAGER: JOHN SMITH PHONE: _____

TYPE OF ESTABLISHMENT: 47 Cafe Restaurant

WATER SUPPLY: _____

HOURS OF OPERATION: _____

DOES THE ESTABLISHMENT EMPLOY A CERTIFIED FOOD MANAGER? YES NO

IF YES, NAME: JOHN SMITH

I affirm that the above information is true to the best of my knowledge and belief

DATE: _____ SIGNATURE: _____

- OFFICE USE ONLY -

Priority Assessment: _____ By: _____

Permit Issued On: _____ By: _____

Establishment Number: 6000470001 Permit Number: _____
(Official Use Only)

IHSENV_Application_For_Permit Page 1 of 1 Report Generated 5/23/2017 5:10:48PM Eastern Time

7.17 AUDITS

The Audit button allows users to view edit history for a selected establishment. To use the Audit button:

1. Use the checkbox to select the desired establishment from the Show Table panel.
2. Click on the Audit button.

Estab. #	Estab. Type	Tribe	Premise Name	Address	City/ST/ZIP	Primary Phone	Alt. Phone	Email	Owner Name	Address	City/ST/ZIP	Active/Deleted	Risk Type	Estab. Status	EHS	Last Survey Date	Permit #	Created By	Updated By	Created On	Last Updated	Google	Map
6000470001	47 Cafe/Restaurant	AK CHIN INDIAN COMM. PAPAGO	KENNY'S TEST CAFE	123 DOES NOT EXIST	STREET	PHOENIX, Arizona	85004	(602) 364-5078		123 DOES NOT EXIST	STREET	PHOENIX, Arizona	85004	Active	Category I - High	Open	2/14/2014			8/13/2013	5/19/2017		

WebEHRS displays a new window with the establishment record number, establishment demographics, establishment name and a history of edits. History includes change date, action performed and the name of the user that performed the action. The user can expand or collapse the edit information using the plus and minus icons next to the date of the change. By default, only the most recent change is expanded. In the expanded view, the screen displays the column name, and before and after values stored in the system.

Auditing- Establishment Record # 26800

Establishment Demographics

Estab. Name KENNY'S TEST CAFE

Change Date	Action	User									
5/19/2017 12:51:24 PM	UPDATE	Test User									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Column Name</th> <th>Before Value</th> <th>After Value</th> </tr> </thead> <tbody> <tr> <td>UPDATE_DATE</td> <td>24-FEB-14</td> <td>19-MAY-17</td> </tr> <tr> <td>PARENT_EST_ID</td> <td></td> <td>26570</td> </tr> </tbody> </table>			Column Name	Before Value	After Value	UPDATE_DATE	24-FEB-14	19-MAY-17	PARENT_EST_ID		26570
Column Name	Before Value	After Value									
UPDATE_DATE	24-FEB-14	19-MAY-17									
PARENT_EST_ID		26570									
2/24/2014 3:27:45 PM	UPDATE										
2/24/2014 3:27:45 PM	UPDATE										

8 TEMPORARY ESTABLISHMENTS

The Temporary Establishments module allows users to search, view, edit, and add Temporary Establishments. This Module also provides tools to assist the user and manage relationships between Temporary Establishments and information contained in other modules.

The Show Table Screen for Temporary Establishments includes multiple panels:

- The top panel is the My Filters and basic search options.
- The second panel is Additional Search Options, Search to execute a search, or Clear to clear the search criteria and search results.
- A row of Menu Buttons separates the Search Filters sections from the result set. Menu Buttons appear in the panel depending upon user permissions.
- The Show Table panel provides the user with a listing of Temporary Establishments that the user has permissions to view that meet the search parameters in the top two panels of the screen.

8.1 SEARCH

The Temporary Establishments Module allows the user to search for one or more Temporary Establishments. WebEHRS provides extensive options for performing searches to include name, location, type, etc. This section provides a few example searches. However, users may perform searches based on workflow and business requirements.

8.1.1 SEARCH BY TEMPORARY ESTABLISHMENT NAME

To search by an Establishment Name:

1. Select the Temporary Establishments tab at the top of the Menu Bar or the Temporary Establishments button on Main Menu screen.
2. Enter all or a portion of a temporary establishment name in the Establishment Name Containing field.
3. Click the Search button.

WebEHRS performs the search based on the Establishment Name containing value and returns the results on the Show Table panel.

Event Name	City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status Email
<input type="checkbox"/>	Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX_UNKNOWN-PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58 Celebration/Fair	Active		6/7/2017 6/7/2017	Open

8.1.2 ADDITIONAL SEARCH OPTIONS

The user may also perform searches using the Additional Search Options:

1. Click the Clear button to reset the search filters.
2. Enter or select the search criteria in the fields under “Additional Search Options”
3. Click the Search button.

Additional Search Options

Event Name Organization Name Stand Location

A1 A2 District

Risk Type Establishment #

Based on the search criteria, WebEHRS returns the results in the Show Table section.

<input type="button" value="Add New"/> <input type="button" value="Copy"/> <input type="button" value="Attachments"/>										
<input type="button" value="Surveys"/> <input type="button" value="R/C/P"/> <input type="button" value="Activities"/> <input type="button" value="Parent Relationships"/> <input type="button" value="Letters"/> <input type="button" value="Surv Hist"/> <input type="button" value="Audit"/>										
<input type="checkbox"/>	Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status Email
<input type="checkbox"/>	Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX UNKNOWN- PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58 Celebration/Fair	Active		6/7/2017 6/7/2017	Open

8.2 VIEW/SHOW RECORDS

From the Show Table section, the user can view, edit, or select a Temporary Establishment to perform one of the functions in the Icon Menu.

<input type="button" value="Add New"/> <input type="button" value="Copy"/> <input type="button" value="Attachments"/>										
<input type="button" value="Surveys"/> <input type="button" value="R/C/P"/> <input type="button" value="Activities"/> <input type="button" value="Parent Relationships"/> <input type="button" value="Letters"/> <input type="button" value="Surv Hist"/> <input type="button" value="Audit"/>										
<input type="checkbox"/>	Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status Email
<input checked="" type="checkbox"/>	Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX UNKNOWN- PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58 Celebration/Fair	Active		6/7/2017 6/7/2017	Open

8.2.1 VIEW ESTABLISHMENT RECORD

After a search is executed, the user may view any of the returned records. To view a Temporary Establishment:

1. Click on the magnifier icon.

<input type="button" value="Add New"/> <input type="button" value="Copy"/> <input type="button" value="Attachments"/>										
<input type="button" value="Surveys"/> <input type="button" value="R/C/P"/> <input type="button" value="Activities"/> <input type="button" value="Parent Relationships"/> <input type="button" value="Letters"/> <input type="button" value="Surv Hist"/> <input type="button" value="Audit"/>										
<input type="checkbox"/>	Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status Email
<input checked="" type="checkbox"/>	Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX UNKNOWN- PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58 Celebration/Fair	Active		6/7/2017 6/7/2017	Open

WebEHRS opens a new screen with a summary of information for the selected establishment including any comments.

View Temporary Establishment OK

Establishment #	6066581004	Active/Deleted	Active	Estab. Status	Open
Estab. Type	58 Celebration/Fair	Service Type	Direct Service		
Area/SU	PHOENIX/PHOENIX	SU/Community	PHOENIX/PHOENIX		
Reservation	_UNKNOWN-PHX_	Tribe	AK CHIN INDIAN COMM. PAPAGO IND, AZ	Risk Type	
	A1		A2		
District					

Permit Information [Click to Show Details..](#)

Vendor Information

Parent Establishment/Event

Event Name Sun Valley Pow-Wow

Establishment Name Sun Valley

Address 1

Address 2

City Phoenix ***State** Arizona ***ZIP Code** [Google Map Via Address..](#)

Organization Name

Contact Name Establishment Owner

Stand Location

Primary Phone	(801) 234-5671	Ext.	Type	Name
Alternate Phone		Ext.	Type	Name

Fax Number

Email Address **Website**

Latitude/ Longitude [Google Map via Coordinates..](#) **Land Status**

GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Water Supply Liquid Waste Disposal

Solid Waste Method

Hours Of Operation

Comments

Owner Information

Name

Address 1

Address 2

City **State** **ZIP Code**

Primary Phone	Ext	Type	Name
Alternate Phone	Ext	Type	Name

Fax Number

Email Address **Website**

Mailing Information

Name

Address 1

Address 2

City **State** **ZIP Code**

Created On 6/7/2017 **Created By** JGrady

Last Updated 6/7/2017 **Updated By** JGrady

View Comments

- Click on the Expand/Collapse arrows icon in the Permit Information bar to show/hide those fields.


*NOTE: The image above shows a panel for "Permit Information." WebEHRS will **NOT** show the Permit Information section by default. The Permit Information Section can be enabled by removing the restriction from the User Restrictions screen. Contact your Area DEHS Division Director who has rights to edit User Data Filters/Permissions for assistance.*

Owner Information

Name
 Address 1 4400 N Central Avenue
 Address 2
 City Phoenix State Arizona ZIP Code 85013
 Primary Phone (502) 695-1999 Ext Type Premise Name
 Alternate Phone Ext Type Name
 Fax Number
 Email Address

Mailing Information

Name
 Address 1 4400 N Central Avenue
 Address 2
 City Phoenix State Arizona ZIP Code 85013
 Created On 12/14/2011 Created By PPattie
 Last Updated 12/28/2011 Updated By PPattie
 Comments 12/28/2011 Effective from 12/28/2011 to 12/30/2011
 This is an annual event. Work schedules and assignments should be included in staff planning each year for the month of December.



Note: If a comment has an alert, the comment text for the establishment will be shaded.

- Click the OK button to return to the Temporary Establishment Show Table screen.

8.3 EDIT TEMPORARY ESTABLISHMENT

To edit an existing Temporary Establishment:

- Click on the edit icon next to the desired Temporary Establishment.

Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status Email
 Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX UNKNOWN- PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58 Celebration/Fair	Active		6/7/2017 6/7/2017	Open

WebEHRS displays the Edit Temporary Establishment screen:

1. Update the Temporary Establishment by adding/editing text values or using the dropdown list boxes.
2. Click on the Save & Return button.

Or

Click on the Cancel button to leave this section without making any changes.

Edit Temporary Establishment Cancel

* Indicates required field

Establishment # 0006581004	* Active/Deleted <input type="text" value="Active"/>	Estab. Status <input type="text" value="Open"/>
* Estab. Type <input type="text" value="58 Celebration/Fair"/>	Service Type <input type="text" value="Direct Service"/>	
* Area/SU <input type="text" value="PHOENIX / PHOENIX"/>	* SU/Community <input type="text" value="PHOENIX / PHOENIX"/>	
Reservation <input type="text" value="_UNKNOWN-PHX_"/>	* Tribe <input type="text" value="AK CHIN INDIAN COMM. PAPAGO IND. AZ"/>	Risk Type <input type="text" value="Please Select"/>
A1 <input type="text"/>	A2 <input type="text"/>	
District <input type="text"/>		

Permit Information Click to Show Details..

Premise Information

Parent Establishment/Event [Lookup](#) [Unlink Relationship](#)

* Event Name

* Establishment Name

Address 1

Address 2

* City State ZIP Code [Google Map Via Address](#)

Organization Name

* Contact Name

Stand Location

* Primary Phone Ext. Type Name

Alternate Phone Ext. Type Name

Fax

Email Address Website

Latitude/ Longitude [Google Map via Coordinates](#) Land Status

GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Water Supply Liquid Waste Disposal

Solid Waste Method

Hours Of Operation

Comments [Spell Check](#)

(Maximum characters: 4000)
You have 4000 characters left.

Owner Information Check here if same as premise

Name

Address 1

Address 2

City State ZIP Code

Primary Phone Ext. Type Name

Alternate Phone Ext. Type Name

Fax Number

Email Address Website

Mailing Information Check here if same as premise Check here if same as owner

Name


Address 1

Address 2

City State ZIP Code

Add New Comment

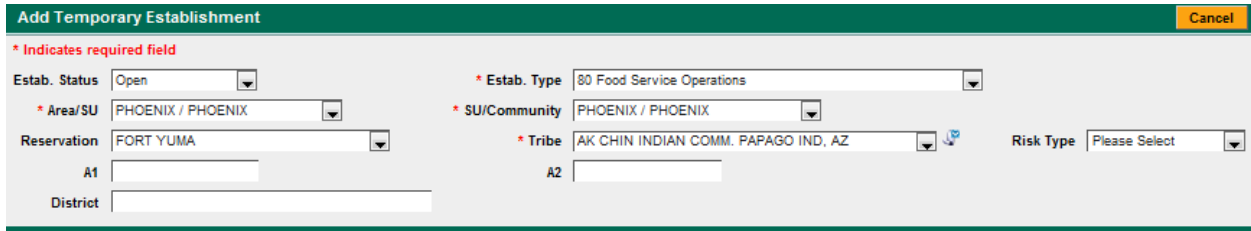
8.4 ADD TEMPORARY ESTABLISHMENTS


Add a Temporary Establishment using the Add New button .

8.4.1 BASE TEMPORARY ESTABLISHMENT

A new screen is displayed for the user to add a new temporary establishment. Required fields are indicated by a small Asterisk (*).

1. Enter all required fields at a minimum.
2. Select an Establishment Type from the dropdown.
3. Select an Area/SU from the dropdown.
4. Select a SU/Community from the dropdown.
5. Select a Tribe using the dropdown.



Note: For Tribe and other dropdowns that provide an extended list of options, an expanded dropdown list is provide beside the standard dropdown as indicated by the  icon.

Users may also enter optional data for Establishment Status, Reservation, A1, A2, District, and Risk Type.

8.4.2 PREMISE INFORMATION

After completing the basic information for adding a Temporary Establishment, add the Premise Information as shown below on the Premise panel. Required fields are indicated by the small Asterisk (*) and include: Event Name, Establishment Name, City, Contact Name, and Primary Phone.

1. Enter all Required Fields.

Premise Information

Parent Establishment/Event [Lookup](#) [Unlink Relationship](#)

* Event Name

* Establishment Name

Address 1

Address 2

* City State ZIP Code [Google Map Via Address](#)

Organization Name

* Contact Name

Stand Location

* Primary Phone Ext. Type Name

Alternate Phone Ext. Type Name

Fax Number

Email Address Website

Latitude/ Longitude [Google Map via Coordinates](#) Land Status

GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Water Supply Liquid Waste Disposal

Solid Waste Method

Hours Of Operation

Comments

[Spell Check](#)

(Maximum characters: 4000)
You have 4000 characters left.

2. Enter additional Premise information as needed. (Optional)

Note: WebEHRS checks to make sure that the Zip Code and first six digits of the phone number are valid.

8.4.2.1 PARENT ESTABLISHMENT

WebEHRS supports parent and child relationships between Permanent and Temporary Establishments. Users may assign a temporary establishment to a parent. To support this action, the system provides an establishment look-up. To select a parent:

1. Click on the [Lookup link](#).

Premise Information

Parent Establishment/Event [Lookup](#) [Unlink Relationship](#)

* Event Name: Sun Valley Pow-Wow

* Establishment Name: Taco Stand

Address 1: 8000 N Central Ave

Address 2:

* City: Phoenix State: Arizona ZIP Code: 85013 [Google Map Via Address](#)

Organization Name:

* Contact Name: George Washington

Stand Location: Section 1 B

* Primary Phone: (502) 555-1234 Ext. Type: Cell Name:

Alternate Phone: Ext. Type: Please Select Name:

Fax:

Email Address: Website:

Latitude/ Longitude: [Google Map via Coordinates](#) Land Status: Please Select

Water Supply: Please Select Liquid Waste Disposal: Please Select

Solid Waste Method: Please Select

Hours Of Operation:

Comments: Temporary Taco Stand to be in place 7 days
(Maximum characters: 4000)
You have 3958 characters left.

WebEHRS opens a new window for the user to search and select a parent establishment.

1. Use Filters to locate the desired establishment.
2. Click on the Select link to set the relationship.

Establishment Lookup

Use the fields below for ad-hoc filtering. Select an Establishment record or click on the red X to close this window.

Estab. Name containing: sun valley

Areas/SU's

- All
- PHOENIX / COLORADO RIVER
- PHOENIX / DUCK VALLEY
- PHOENIX / ELKO

Reservations

- All
- ACOMA
- AK-CHIN MARICOPA
- ALABAMA COUSHATTA LIVINGSTON TEXAS

SU's/Communities

- All
- ABSENTEE-SHAWNEE TRIBE, OK
- AFOGNAK
- AGUA-CALIENTE BANDO CAHULLA INDIANS, CA

Tribes

- All
- ABSENTEE-SHAWNEE TRIBE, OK
- AFOGNAK
- AGUA-CALIENTE BANDO CAHULLA INDIANS, CA

Establishment Type

- All
- 01 Comprehensive Health Care Referral Facility
- 02.1 Hospital w/ Surgery w/ DEHS Funded Safety Officer
- 02.2 Hospital w/ Surgery and No DEHS Funded Safety Officer
- 02.3 Hospital w/o Surgery w/ DEHS Funded Safety Officer
- 02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Officer
- 03.1 Health Center w/ DEHS Funded Safety Officer
- 03.2 Health Center w/ no DEHS Funded Safety Officer
- 04 School Health Center
- 05 Health Station

Address containing: City:

Service Type: All Active/Deleted: All

Additional Search Options

RRM Status: All Risk Type: All Establishment #: A1: A2: District: Estab. Status: All

[Search](#) [Clear](#)

1 of 1 2 Items 10 Page Go

Name	Estab. Type	Address 1	City / ST / ZIP
Select SUN VALLEY RESORT AND CASINO HOTEL	32.2 Motel/Hotel	4400 N. CENTRAL AVE	PHOENIX Arizona 85013
Select SUN VALLEY RESORT AND CASINO	49 Bingo Parlor / Gaming Facility	4400 N. CENTRAL AVE	PHOENIX Arizona 85013

Once the selection is made, the lookup window closes.

2. From the Edit Temporary Establishment page, click Save and Return.
Note: If the user does not Save the Temporary Establishment after selecting a Parent link, the link will be lost.

Premise Information

Parent Establishment/Event [SUN VALLEY RESORT AND CASINO](#) [Unlink Relationship](#)

* Event Name

* Establishment Name

Address 1

Address 2

* City State ZIP Code [Google Map Via Address](#)

Organization Name

Note: Any Owner and Mailing Information associated with the Parent Establishment/Event populates the respective fields for the child temporary establishment.

Parent/Child relationships can be unlinked. To unlink a relationship, the user must edit the Temporary Establishment and take the following actions:

1. Click on the [Unlink Relationship link](#).
2. Save the change.

Note: Owner and Mailing Information that was previously copied from the Parent Establishment will remain the same even after the Parent Establishment is “unlinked” from this child temporary establishment.

Premise Information

Parent Establishment/Event [Lookup..](#) [Unlink Relationship](#)

* Event Name

* Establishment Name

Address 1

Address 2

* City State ZIP Code

[Google Map Via Address](#)

8.4.3 OWNER INFORMATION AND MAILING INFORMATION

After the user has entered Premise information, the user may continue to add additional information for Owner and/or Mailing information or save the establishment.

Owner Information Check here if same as premise

Name

Address 1

Address 2

City State ZIP Code x

Primary Phone Ext Type Name

Alternate Phone Ext Type Name

Fax Number

Email Address Website

Mailing Information Check here if same as premise Check here if same as owner

Note: If the information is the same or similar to the Premise Information, the user may copy the information by using the “Check here if same as premise” checkbox. To copy the information from Premise:

1. Click in check box on the Owner Information shaded panel bar.
2. Click in check box on the Mailing Information shaded panel bar.

8.4.4 VIEW/ADD COMMENTS FOR TEMPORARY ESTABLISHMENTS

Comments may be added to Temporary Establishments. To view existing comments for the Temporary Establishment:

1. Click the View Comments button (at the bottom of the Temporary Establishments screen).

The screenshot shows two forms: 'Owner Information' and 'Mailing Information'. Both forms have a green header bar with a checkbox labeled 'Check here if same as premise'. The 'Owner Information' form contains fields for Name (George Washington), Address 1 (0000 N Central Ave), Address 2, City (Phoenix), State (Arizona), ZIP Code (85013), Primary Phone ((502) 555-1234), Alternate Phone, Fax Number, Email Address, and Website. The 'Mailing Information' form contains fields for Name, Address 1, Address 2, City, State (Please Select), and ZIP Code. A red circle highlights the 'View Comments' button in the bottom left corner of the 'Mailing Information' form. Below the forms is a checkbox labeled 'Add New Comment'.

WebEHRS will open a new window in the browser for Comments. All existing Comments entries will be listed in the Show Table. To add a new comment from the Comments screen:

1. Click on the Add New button.

The screenshot shows the 'Comments' screen. At the top is a green header bar. Below it are search filters: 'Include current alerts?' with a dropdown set to 'All', 'Active/Deleted' with a dropdown set to 'All', and a 'Search' button. Below the filters is a toolbar with an 'Add New' button (highlighted with a mouse cursor), a red 'X' icon, a Word icon, an Excel icon, a PDF icon, a refresh icon, and a delete icon. To the right of the toolbar is a pagination control showing '0 of 0' items, '0 Items', '10 /Page', and a 'Go' button. Below the toolbar is a table with the following columns: 'Date', 'Description', 'Alert?', 'Alert Date Range', 'Created By Updated By', and 'Created On Last Update'. At the bottom left is an 'OK' button, and to its right is a red text message: 'Click OK to close window and return to previous screen.'

The application opens a new window. To create a comment:

1. Enter comment date (or accept the default of today's date).
2. Enter comment text.
3. If it is an alert, enter a date range for Alert From and Alert To (optional).
4. If it is an alert, select the checkbox for Alert? (Optional).
5. Click the Save button.

Add Comment

Comment Date: 06/08/2017

Description: Add a new comment using this function. Comments will be saved to the establishment record. The comment date is automatically set to today's date. However, the user can change the date if needed. Additionally, alerts can be set for the comment with from and to dates.

(Maximum characters: 4000)
You have 3735 characters left.

Alert From: 06/07/2017

Alert To: 06/23/2017

Alert?:

Save Cancel

After saving the new comment, WebEHRS returns the user to the Comments screen. To close the Comment screen, click on the OK button.

Comments

Include current alerts? All Active/Deleted All Search

Add New

Date	Description	Alert?	Alert Date Range	Created By/Updated By	Created On/Last Update
------	-------------	--------	------------------	-----------------------	------------------------

OK Click OK to close window and return to previous screen.

Users may add a new comment for a Temporary Establishment directly from the Add/Edit Temporary Establishment screen (without opening the Comments pop-up window).

View Comments

Add New Comment

To add a comment:

1. Select the checkbox for Add New Comment.
2. Accept the default date and time or change to alternative.

3. Select the “Alert?” Checkbox to set the Comment as an Alert (optional).
4. Enter Alert Effective From/To date values, if appropriate (optional).
5. Enter text for comment.
6. After the comment entry is complete, save by clicking the Save & Return button.

8.5 COPY

WebEHRS allows a user to copy an existing Temporary Establishment to create a new Temporary Establishment. To copy a Temporary Establishment:

1. Use the Search Filters to locate the Temporary Establishment to be copied.
2. Select the Temporary Establishment using the check box for the desired establishment.
3. Click the Copy button.

Event Name	City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type	Stand Location	Active/Deleted	Entered By	Created By	Updated By	Created On	Last Updated	Estab. Status	Email
<input checked="" type="checkbox"/>	Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX_UNKNOWN-PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58	Celebration/Fair	Active				8/7/2017	8/7/2017	Open	

WebEHRS opens the Add Temporary Establishment screen. The copied Temporary Establishment’s demographics will be filled in for all appropriate fields automatically. To finish creating the new Temporary Establishment:

1. Modify any fields that are different.
2. Change the Establishment Name.
3. Enter additional data as needed (optional).
4. Click the Save and Return button.
5. Or click the Save and Continue button (if supplemental information is applicable/necessary).

Note: If the Establishment Name is not modified, WebEHRS will prompt the user with an error message. No two Temporary Establishments may share the same Area, Service Unit and Establishment Name.

Add Temporary Establishment
Cancel

* Indicates required field

* Estab. Status: <input type="text" value="Open"/>	* Estab. Type: <input type="text" value="80 Food Service Operations"/>		
* Area/SU: <input type="text" value="PHOENIX / PHOENIX"/>	* SU/Community: <input type="text" value="PHOENIX / PHOENIX"/>	* Tribe: <input type="text" value="AK CHIN INDIAN COMM. PAPAGO IND, AZ"/>	Risk Type: <input type="text" value="Please Select"/>
Reservation: <input type="text" value="FORT YUMA"/>	A1: <input type="text"/>	A2: <input type="text"/>	
District: <input type="text"/>			

Premise Information

Parent Establishment/Event [Lookup](#) [Unlink Relationship](#)

* Event Name: <input type="text" value="Sun Valley Pow-Wow"/>			
* Establishment Name: <input type="text" value="BQ Concession Stand"/>			
Address 1: <input type="text" value="4400 N Central Avenue"/>			
Address 2: <input type="text"/>			
* City: <input type="text" value="Phoenix"/>	State: <input type="text" value="Arizona"/>	ZIP Code: <input type="text" value="85013"/>	Google Map Via Address
Organization Name: <input type="text" value="Sun Valley Event Hosting"/>			
* Contact Name: <input type="text" value="Lucy Brown"/>			
Stand Location: <input type="text" value="Event Staging Area 2C"/>			
* Primary Phone: <input type="text" value="(502) 895-1999"/>	Ext.: <input type="text"/>	Type: <input type="text" value="Premise"/>	Name: <input type="text"/>
Alternate Phone: <input type="text"/>	Ext.: <input type="text"/>	Type: <input type="text" value="Please Select"/>	Name: <input type="text"/>
Fax Number: <input type="text"/>			
Email Address: <input type="text"/>	Website: <input type="text"/>		
Latitude/ Longitude: <input type="text"/>	Google Map via Coordinates		Land Status: <input type="text" value="Please Select"/>
<small>GPS coordinates should be in decimal(Ex: Latitude 38.19802 Longitude -84.86261)</small>			
Water Supply: <input type="text" value="Please Select"/>	Liquid Waste Disposal: <input type="text" value="Please Select"/>		
Solid Waste Method: <input type="text" value="Please Select"/>			
Hours Of Operation: <input type="text"/>			
Comments: <input type="text"/>			
<small>(Maximum characters: 4000) You have 4000 characters left.</small>			

WebEHRS will return the user to the Temporary Establishments Show Table Screen with the new temporary establishment displayed in the Show Table

Add New Copy Attachments										
Surveys R/C/P Activities Parent Relationships Letters Surv Hist Audit										
	Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status Email
<input type="checkbox"/>	Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX UNKNOWN-PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58 Celebration/Fair	Active		8/7/2017 8/7/2017	Open

8.6 ATTACHMENTS BUTTON

The Attachments button allows the user to view attachments associated with a selected temporary establishment. To use the Attachments button:

1. Use the checkbox to select the desired temporary establishment from the Show Table panel.
2. Click the Attachments button.

Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status Email
<input checked="" type="checkbox"/> Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX UNKNOWN-PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58 Celebration/Fair	Active		8/7/2017 6/7/2017	Open

WebEHRS opens a pop-up window and displays the temporary establishment name, address, establishment type, and any existing attachments for the selected establishment.

Temporary Establishment

Name/Address	Establishment Type
Sun Valley Phoenix, Arizona	58 Celebration/Fair

Attachments

Active/Deleted: ACTIVE Search Clear

File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
0 of 0 items				

To upload a new attachment:

1. Click the Upload button.
2. Use the Browse button to search for the desired file.
3. Select a Document Type from the drop-down menu.
4. Click Save and Upload.

Attachment Upload

* Indicates required field

Please remember that excessively large files can take a long time to load. Click the Browse button below to select your file.

* File Name Browse...

* Document Type Please Select ▼

Save and Upload
Cancel

The new attachment displays with the file name, document type, created on/last updated dates, updated by, and active/deleted status.


Temporary Establishment

Name/Address Establishment Type
Sun Valley 58 Celebration/Fair
Phoenix, Arizona

Attachments

Active/Deleted: ACTIVE Search Clear

Upload [Icons] 1 of 1 1 Items 10 /Page Go

File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
 Test Attachment.docx	Assessments	6/9/2017 / 6/9/2017		ACTIVE

To update or modify (replace) the attachment:

1. Click the Edit record  icon.

Update/Modify Attachment

*** Indicates required field**

This allows you to update/modify the information in this pop-up. You cannot edit the document itself, but you can replace the document. Please remember that excessively large files can take a long time to load.

Click the Browse button below to select your file.

File Name Browse...

Current File Name Test Attachment.docx

* Document Type Assessments

* Active/Deleted ACTIVE

Save and/or Upload Cancel

The document type and active/delete status can be modified, but the document itself cannot be edited; only replaced with a new document.

Click Save and/or Upload or Cancel without saving.

8.7 SURVEY BUTTON

The survey button allows users to view surveys associated with the selected Temporary Establishment. To use the survey button:

1. Use the checkbox to select the desired Temporary Establishment from the Show Table panel.
2. Click the Surveys button.

Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status
<input type="checkbox"/> Sun Valley Pow-Wow Phoenix	BQ Concession Stand	PHOENIX PHOENIX	PHOENIX FORT YUMA	AK CHIN INDIAN COMM. PAPAGO IND, AZ Sun Valley Event Hosting	80 Food Service Operations Event Staging Area 2C	Active	VGray VGray	12/14/2011 12/14/2011	Open

WebEHRS displays a screen from the Survey module. The screen displays the Temporary Establishment’s demographics in the Temporary Establishment Panel (Establishment Name, Address, Establishment Type, and Next Survey Due). The Survey history (if any) is displayed in the Survey History panel. If there are no previous surveys, no surveys will be shown.

Temporary Establishment										
Name/Address	Establishment Type	Next Survey Due								
Sun Valley Phoenix, Arizona	58 Celebration/Fair									

Survey Date	Survey Purpose	EHS	Survey Status	Date Finalized	Critical Viols Found	R/C/P Title	Survey Type	Origin	Create User Update User	Setup Date Update Date	Active/Deleted
0 Items / Page											

Adding a new survey is addressed in the Surveys Module section of this User Guide.

To return to the Temporary Establishments Show Table Screen:

3. Click on the Return to Temporary Establishments button.

8.8 R/C/P BUTTON

The R/C/P button allows the user to view requests, complaints, and projects (R/C/P) associated with the selected temporary establishment. To use the R/C/P button:

1. Use the checkbox to select the desired Temporary Establishment from the Show Table panel.
2. Click the R/C/P button.

Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Status Email
<input checked="" type="checkbox"/> Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX_UNKNOWN-PHX_	AK CHIN INDIAN COMM. PAPAGO IND, AZ	58 Celebration/Fair	Active		6/7/2017 6/7/2017	Open

WebEHRS displays a screen from the R/C/P Module. The screen displays the Temporary Establishment’s demographics in the Temporary Establishment Panel (Establishment Name, Address, Establishment Type, and Next Survey Due). The R/C/P panel includes R/C/Ps linked to the temporary establishment and buttons to perform tasks related to R/C/Ps such as add new, copy, and many others.



Adding a new R/C/P and using the other functions on this screen are addressed in the R/C/P module section of this User Guide.

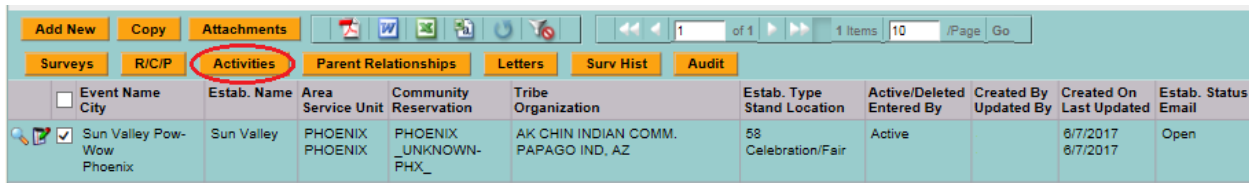
To return to the Temporary Establishment module:

1. Click on the Return to Temporary Establishments button.

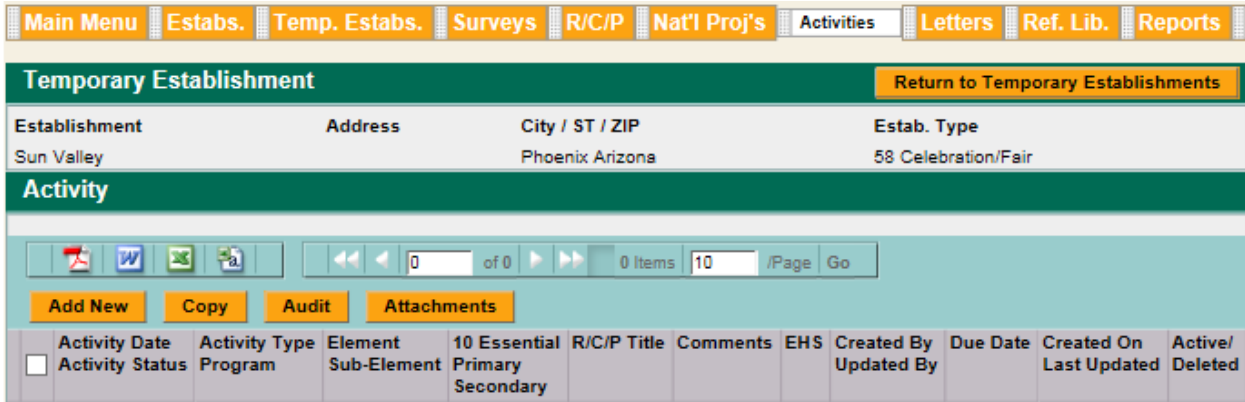
8.9 ACTIVITIES BUTTON

The Activities button allows the user to view activities linked to the temporary establishment. To use the Activities button:

1. Use the checkbox to select the desired Temporary Establishment from the Show Table panel.
2. Click on the Activities button.



WebEHRS displays a screen from the Activities Module. The screen displays the Temporary Establishment’s demographics in the Temporary Establishment Panel (Establishment Name, Address and Establishment Type) and the linked activities in the Activity panel.



Adding new Activities and other functions for activities are addressed in the Activities module section of this User Guide.

To return to the Temporary Establishment module click the Return to Temporary Establishments button.

8.10 PARENT RELATIONSHIP BUTTON

The Parent Relationship button allows the user to view and edit the link between the Temporary Establishment and its Parent establishment. To use the Parent Relationship button:

1. Select the **Child** temporary establishment using the check box for the desired establishment from the Show Table.
2. Click the Parent Relationships button.



WebEHRS displays a screen showing the Parent/Child relationships. The screen displays the Parent Establishment’s demographics in the top panel (Establishment Name, Area, Service Unit, Establishment Type, Establishment Number, and Address). The Child Establishment(s) displays in the Associated Child Establishment(s) in the lower panel. From the Establishment Parent/Child screen, the user may navigate to the View Temporary Establishment or Edit Temporary Establishment screens for any of the Child Temporary Establishments listed. The user may also unlink the relationship between the Child and Parent.

- To view the child establishment information, click the magnify icon.
- To edit the child establishment, click the edit icon.
- To unlink a child establishment, click the Unlink button.

Main Menu | Estabs. | Temp. Estabs. | Surveys | R/C/P | Nat'l Proj's | Activities | Letters | Ref. Lib. | Reports | M

Establishment Parent/Child Links Return to Temporary Establishments

Name SUN VALLEY RESORT AND CASINO Area PHOENIX Service Unit PHOENIX
 Estab. Type 49 Bingo Parlor / Gaming Facility Establishment # 6066491000
 Address 1 4400 N. CENTRAL AVE
 Address 2
 City PHOENIX State Arizona ZIP 85013

Associated Child Establishment(s)

Click on the Unlink button to the right of the Establishment to remove the Parent-Child relationship. These must be done one at a time. Each Unlink function will refresh this page.
 NOTE: Removing the Parent-Child relationship will NOT delete the Establishment.

Establishment #	Name/ Address	Estab. Type	Areas Service Units	Setup Date Last Update	
6066471000	SNOOPY'S CAFE 4400 N. CENTRAL AVE PHOENIX Arizona 85013	47 Cafe/Restaurant	PHOENIX PHOENIX	11/17/2011 12/13/2011	Unlink
6066321000	SUN VALLEY RESORT AND CASINO HOTEL 4400 N. CENTRAL AVE PHOENIX Arizona 85013	32.2 Motel/Hotel	PHOENIX PHOENIX	11/17/2011 11/30/2011	Unlink
6066581000	Sun Valley Consession Stands 4400 N. CENTRAL AVE PHOENIX Arizona 85013	58 Celebration/Fair	PHOENIX PHOENIX	12/14/2011 12/14/2011	Unlink

To return to the establishment Show Table screen:

1. Click on the Return to Temporary Establishments button.

8.11 LETTERS BUTTON

The Letters button will show the Letters history for the selected temporary establishment. To use the Letters button:

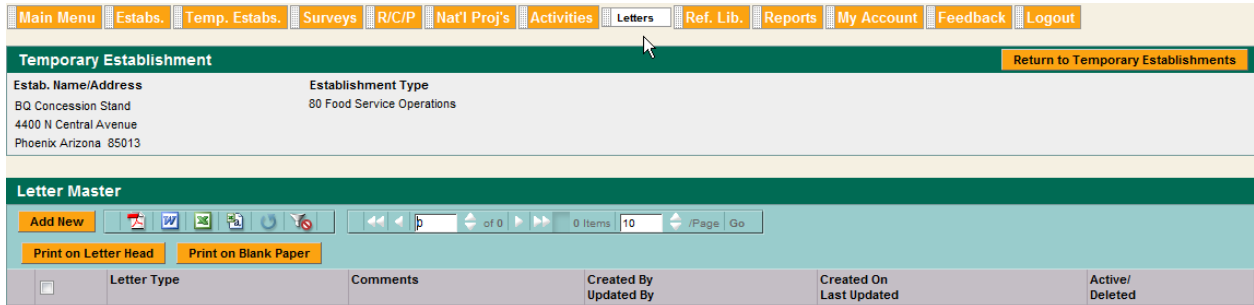
1. Use the checkbox to select the desired Temporary Establishment from the Show Table panel.
2. Click the Letters button.

Add New | Copy | Attachments | [Icons] | 1 of 1 | 1 Items | 10 /Page | Go

Surveys | R/C/P | Activities | Parent Relationships | **Letters** | Surv Hist | Audit

<input type="checkbox"/>	Event Name City	Estab. Name	Area Service Unit	Community Reservation	Tribe Organization	Estab. Type Stand Location	Active/Deleted Entered By	Created By Updated By	Created On Last Updated	Estab. Sta Email
<input checked="" type="checkbox"/>	Sun Valley Pow-Wow Phoenix	Sun Valley	PHOENIX PHOENIX	PHOENIX _UNKNOWN-PHX_	AK CHIN INDIAN COMM. PAPAGO IND. AZ	58 Celebration/Fair	Active		6/7/2017 6/7/2017	Open

WebEHRS displays a screen from the Letters Module. The screen displays the Temporary Establishment's demographics in the Temporary Establishment panel at the top of the screen (Establishment Name, Address and Establishment Type) and the letter history in the Letter Master panel immediately below.



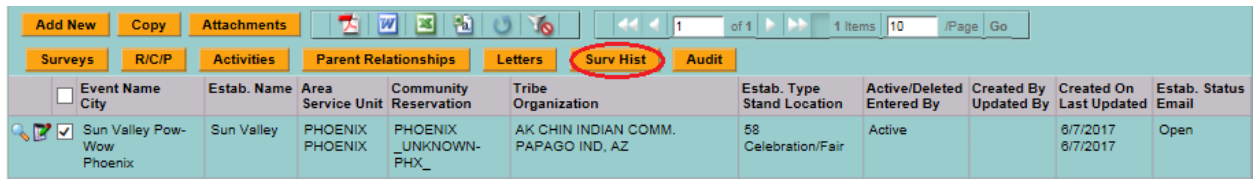
Information about viewing letters, adding new letters, and other functions for Letters is provided in the Letter Module section of this User Guide. To return to the Temporary Establishments Show Table Screen:

3. Click the Return to Temporary Establishments button.

8.12 SURVEY HISTORY BUTTON

The Survey History button allows users to view the survey history for a selected temporary establishment. To use the Survey History button:

1. Use the checkbox to select the desired Temporary Establishment from the Show Table panel.
2. Click on the Surv Hist button.



A pop-up window displays the Survey History report, listing Inspectors, Survey Dates, and Violation Summary of Survey. Clicking a survey date displays the selected survey details.



Indian Health Service

Survey History of Sun Valley
58 Celebration/Fair

*** click on the survey date to see the survey details ***

<i>Recreational Area Survey</i>		
Inspector(s):	Survey Dates	Violation Summary of Survey
John	06/07/2017	Total Violations: 0 (C-0) (R-0) (COS-0)



Indian Health Service

Survey History of Sun Valley

Recreational Area Survey - 6/7/2017

Listing of Survey IN/OUT Categories

[*** Click here to see the Inspection Comments ***](#)

Inspected By: John

IN/OUT Categories: [*** Click on the blue italic underlined categories to see the violations in that category and the violation comments. ***](#)

1. Site and lots well drained; Graded
2. Lots numbered and displayed in a systematic order
3. Lot size in compliance; RV parking in compliance
4. Width of community street; community playground area accessible, fenced or free of traffic hazards
5. Community streets, driveways, parking and walkways maintained
6. Access to RV parking areas; sufficient parking and maneuvering space
7. Lighting at entrances, intersections, service buildings and sanitary stations
8. Adequate supply
9. Approved Source
10. Approved treatment
11. Approved distribution lines and connections; RV space connections located and constructed to prevent damage
12. One watering station / 50 spaces; minimum of 50 ft separation from sanitary station
13. Backflow and Backsiphonage prevention
14. Sewage system operation
15. RV Space sewer riser connection
16. Approved community sewer connection materials
17. Sewer outlets capped on vacant lots
18. One sanitary station / 75 spaces; properly constructed; satisfactory operation
19. Water outlet hose reel or tower mounted; vacuum breaker installed properly; sign posted: (This water for flushing and cleaning purposes only.) OR (Non-Potable, Do Not Drink.)
20. Refuse stored in approved containers
21. Sufficient numbers and capacity of containers
22. Refuse collection stands provided for containers less than 35 gallon capacity; designed and maintained
23. Frequent collection
24. Disposed in approved manner
25. Location; adequate building; clean, good repair; outer openings protected.
26. Sufficient lighting; refuse containers; covered waste receptacle in women toilet stalls; towels or mechanical dryers; self closing doors
27. Community free of insect and rodent harborage and infestation
28. Storage areas maintained; lumber, pipe, building material stored one (1) foot above the ground

Close the pop-up windows to return to the Temporary Establishments page.

8.13 AUDITS

The Audit button allows the users to view the edit history for the selected temporary establishment. To use the Audit button:

1. Use the checkbox to select the desired Temporary Establishment from the Show Table panel.
2. Click on the Audit button.

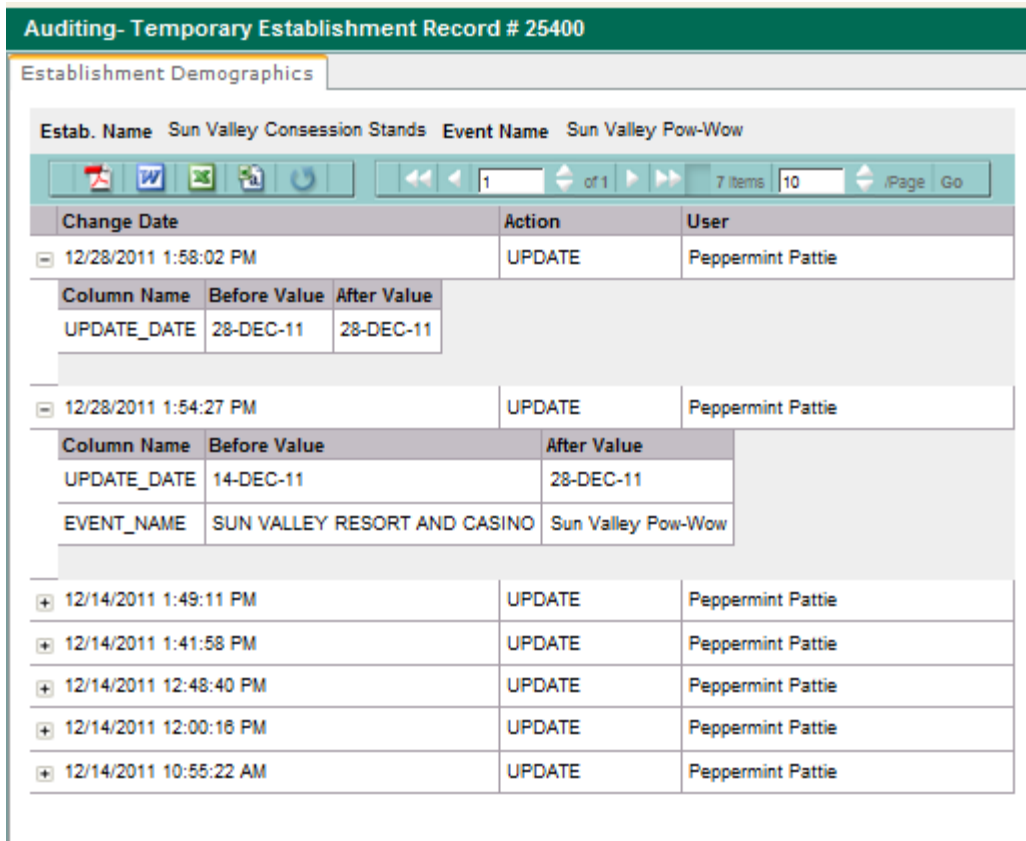


WebEHRS displays the Auditing screen. The Temporary Establishment Name and Event will be shown for reference. The audit history (change date, action performed, and the name of the user that performed the action) will be shown on the screen.

3. Click the plus icon to expand a row or the minus icon to collapse the row.

NOTE: By default only the most recent change is expanded when the screen initially loads.

In the expanded view, the screen displays the column name, and the before and after values.

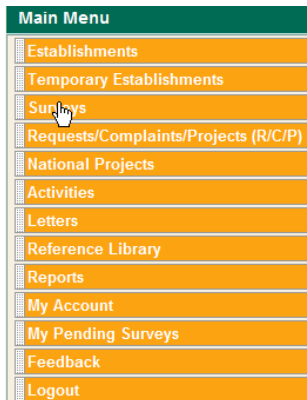


9 SURVEYS

The Surveys module allows users to search, view, edit, and create new surveys. This Module also provides tools to assist the user to manage: relationships between surveys and establishments; documents contained in WebEHRS; and surveys entered via the WebEHRS Mobile application.

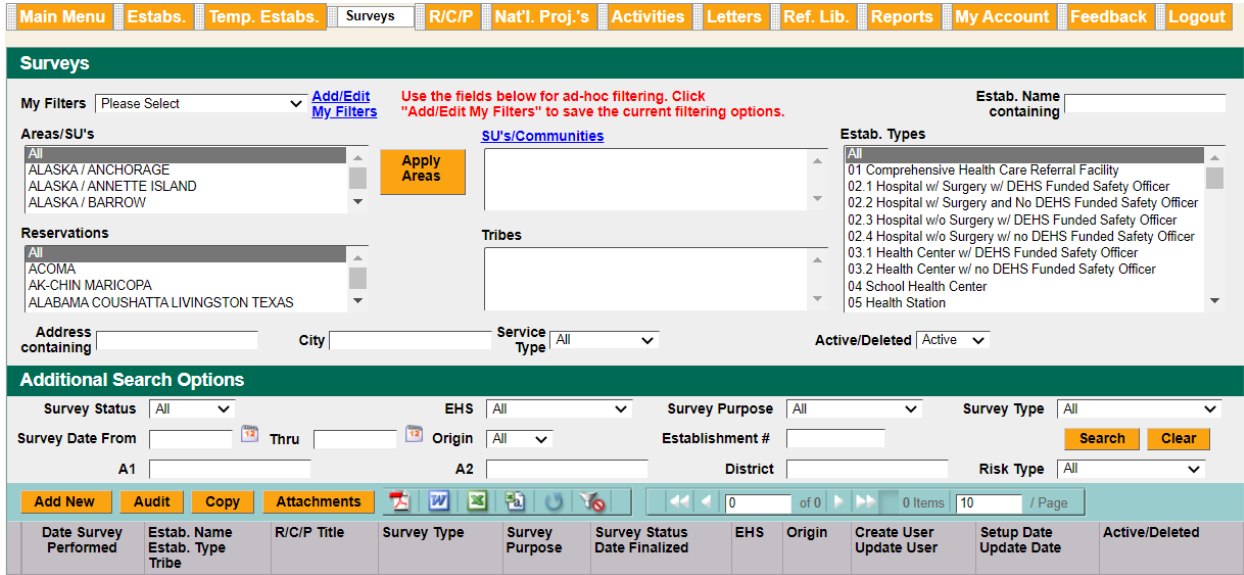
The Surveys module can be accessed from the Main Menu or from the Main Menu Bar within other modules. To navigate to Surveys from the Main Menu:

1. Click on the Surveys button.



The Show Table Screen for Surveys includes multiple panels:

- The top panel is the My Filters and basic search options.
- The middle panel is Additional Search Options, Search to execute a search, or Clear to clear the search criteria and search results.
- A row of Menu Buttons separates the Search from the results set. Menu Buttons appear in the row depending upon user permissions.
- The Show Table provides the user with a listing of Surveys based on search parameters and user permissions.



9.1 SEARCH

The Surveys Module allows users to query the database for Survey records. As shown in other sections of this User Guide, My Filters can be used to perform common searches.

To apply a My Filter:

1. Select a My Filter value from the My Filters drop-down list box.
2. Click on the Search button.

NOTE: Additional detailed information about Filters and how to best use filters is provided in Appendix C – Using Filters in WebEHRS.

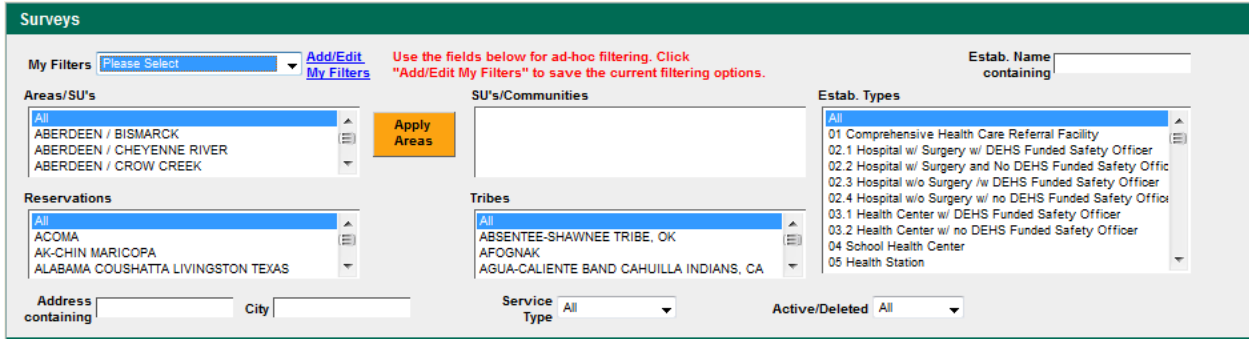
Alternatively, a user can choose to query the database using any combination of the filters available for a Surveys query. In the sample image (below), when the Show Table screen initially loads, all drop-down filters will be set to All (the default setting). Queries can be performed to see All records, but most searches will be performed with one or more filters selected to return a manageable result set.

NOTE: The search filters pick list boxes for Areas/SU's, SU's/Communities, Establishment Types, Reservations and Tribes will populate with values based upon the user account's permissions (Data Filters).

To apply a Search:

1. Make selections or enter values in the search filter fields.
2. Click on the Search button.

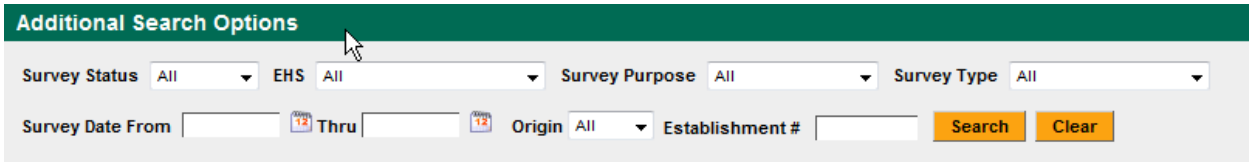
NOTE: If you want to search on SU's/Communities, you must first select one or more Areas/SU's values and Click the Apply Areas button.



The top panel of Search Filters is general and applies to all modules within WebEHRS. The Additional Search Options panel contains fields for building queries that are specific to the Survey record type.

For the Surveys Module, Additional Search Options include:

- Survey Status
- EHS
- Survey Purpose
- Survey Type
- Survey Date From/Thru
- Origin
- Establishment #



9.2 SELECT ESTABLISHMENT TO ACCESS SURVEYS

An establishment can be selected to access surveys from the Establishments module or from the Lookup in the Surveys module.

To select an establishment from the Establishments module:

1. Select Establishment or Temporary Establishment from the Main Menu.
2. Enter all or a portion of an Establishment Name in search for Estabs. Name containing field.
3. Click on the Search Button.

WebEHRS performs the search based on the filters and returns results to the Show Table panel.

- Use the checkbox to select the desired Establishment from the Show Table panel.
- Click on the Surveys button.

Add New Copy Print PDF Excel Refresh Home Back Forward 1 of 1 2 Items 10 /Page Go										
Surveys R/C/P Activities Child Relationships Parent Relationships Edit Supplemental Info. Comments Letters Audit										
	<input type="checkbox"/>	Estab. # Estab. Type Permit #	Premise Name Address City/ST/ZIP	Primary Phone Alt. Phone	Owner Name Address City/ST/ZIP	Active/Deleted Risk Type Estab. Status	EHS Last Survey Date	Created By Updated By	Created On Last Updated	Google Map
	<input type="checkbox"/>	6066421000 42 Bakery, Cannery, Bottling	SNOPPY'S BAKER AND COFFEE SHOP 4400 N CENTRAL AVE PHOENIX Arizona 85013	(502) 695-1999	4400 N CENTRAL AVE PHOENIX Arizona 85013	Active Open		VGray VGray	11/17/2011 11/30/2011	
	<input checked="" type="checkbox"/>	6066471000 47 Cafe/Restaurant	SNOPPY'S CAFE 4400 N. CENTRAL AVE PHOENIX Arizona 85013	(502) 695-1999	LUCY BROWN 4400 N. CENTRAL AVE PHOENIX Arizona 85013	Active Open	Charlie Brown 11/30/2011	VGray VGray	11/17/2011 11/30/2011	

WebEHRS displays a screen from the Survey Module for the establishment and any existing surveys.

In the Establishment panel, the screen displays the name, address, type, and next survey due date in the establishment panel. Survey history is displayed in the Survey History panel including date survey was performed, survey type, survey purpose, EHS, survey status, date finalized, critical violations found, R/C/P title, activity type, origin (of survey), dates and active/delete.

Main Menu | Estabs. | Temp. Estabs. | Surveys | R/C/P | Nat'l. Proj.'s | Activities | Letters | Ref. Lib. | Reports | My Account | Feedback | Logout

Establishment [Return to Establishments](#)

Name/Address: SNOPPY'S CAFE
4400 N. CENTRAL AVE
PHOENIX, Arizona 85013

Establishment Type: 47 Cafe/Restaurant

Next Survey Due: 11/21/2011

Survey History

[Add New](#) [Audit](#) 1 Items 10 /Page Go

<input type="checkbox"/>	Date Survey Performed	Survey Type	Survey Purpose	EHS	Survey Status	Date Finalized	Critical Viols Found	R/C/P Title	Activity Type	Origin	Create User Update User	Setup Date Update Date	Active/Deleted
	11/30/2011	FDA 2001 Food Survey	Pre-Operational	Brown,Charlie	InProcess		0			IMS	VGray VGray	11/30/2011 11/30/2011	Active

To view an existing survey for a specific establishment from the Surveys module:

1. Enter an establishment name in the search field for Establishment Name Containing, if known.
2. Click on the Search button.

Surveys

My Filters Please Select [Add/Edit My Filters](#) Use the fields below for ad-hoc filtering. Click "Add/Edit My Filters" to save the current filtering options.

Estab. Name containing:

Areas/SU's: [Apply Areas](#)

Reservations:

SU's/Communities:

Tribes:

Estab. Types:

Address containing: City:

Service Type: Active/Deleted:

Additional Search Options

Survey Status: EHS: Survey Purpose: Survey Type:

Survey Date From: Thru: Origin: Establishment #:

[Search](#) [Clear](#)

WebEHRS applies the search criteria and displays any associated surveys in the show table.

[Add New](#) [Audit](#) 1 Items 10 /Page Go

<input type="checkbox"/>	Date Survey Performed	Estab. Name Estab. Type	R/C/P Title	Survey Type	Survey Purpose	Survey Status Date Finalized	EHS	Origin	Create User Update User	Setup Date Update Date	Active/Deleted
	11/30/2011	SNOPY'S CAFE 47 Cafe/Restaurant		FDA 2001 Food Survey View Activities	Pre-Operational	InProcess	Pattie, Peppermint	IMS	VGray VGray	11/30/2011 12/2/2011	Active

9.3 ADD SURVEY FROM ESTABLISHMENT MODULE

To add a new survey from the Surveys page, click Add New.

Main Menu Estabs. Temp. Estabs. Surveys **R/C/P** Nat'l. Proj.'s Activities Letters Ref. Lib. Reports My Account Feedback Logout

Surveys

My Filters Please Select [Add/Edit My Filters](#) Use the fields below for ad-hoc filtering. Click "Add/Edit My Filters" to save the current filtering options.

Estab. Name containing

Areas/SU's:

Reservations:

Address containing City Service Type Active/Deleted

Additional Search Options

Survey Status EHS Survey Purpose Survey Type

Survey Date From Thru Origin Establishment #

A1 A2 District Risk Type

0 of 0 10 / Page

Date Survey Performed	Estab. Name	R/C/P Title	Survey Type	Survey Purpose	Survey Status	EHS	Origin	Create User	Setup Date	Active/Deleted
-----------------------	-------------	-------------	-------------	----------------	---------------	-----	--------	-------------	------------	----------------

Establishment / R/C/P

[Establishment Lookup...](#) [R/C/P Lookup...](#) [Reset R/C/P](#)

Name/Address	Establishment Type	Next Survey Due	R/C/P Title	R/C/P #
--------------	--------------------	-----------------	-------------	---------

Add Survey

* Indicates required field

*Survey Date *Survey Type

Enter a survey date, select a survey type and click Continue to display the full Add Survey page.

WebEHRS opens the Add Survey screen for the selected Establishment.

Enter the Survey Date and select the Survey Type from the drop-down.

Establishment / R/C/P

[Establishment Lookup...](#) [R/C/P Lookup...](#) [Reset R/C/P](#)

Name/Address	Establishment Type	Next Survey Due	R/C/P Title	R/C/P #
BILLY'S WING SHACK 157 W Riverside Drive Parker, Arizona 85344	47 Cafe/Restaurant	5/16/2023		

Add Survey

* Indicates required field

*Survey Date *Survey Type

Enter a survey date, select a survey type and click Continue to display the full Add Survey page.

- Please Select
- FDA 2001 Food Survey
- FDA 2005 Food Survey
- FDA 2009 Food Survey
- FDA 2013 Food Survey
- FDA 2017 Food Survey
- Navajo Nation Food Survey

Click Continue.

WebEHRS opens the additional panels on the Add Survey page. Panels are opened based upon the Survey Type. Some Survey Types will show additional panels for sampling results. All Surveys will include these common panels:

- Establishment,
- Add Survey,
- Violations
- Program/Element/Sub Element/Sub-Sub Element Information (or P/E/S/S/SS), 10 Essential Elements.

Establishment / R/C/P Cancel

Name/Address	Establishment Type	Next Survey Due	R/C/P Title	R/C/P #
BILLY'S WING SHACK 157 W Riverside Drive Parker, Arizona 85344	47 Cafe/Restaurant	5/16/2023		

Add Survey

* Indicates required field

Survey Date: 01/13/2023 Survey Type: FDA 2017 Food Survey

* Survey Purpose: Please Select *EHS: Toll-free Emergency

For definitions of Survey Purpose values, click the Survey Purpose label. Select item from list and click button to view a Survey Reference Document View

Score N/A: Score: Score entry is optional

Criticals Found

Time In:

Time Out:

Travel Time: v hrs v min Latitude / Longitude: [Google Map via Coordinates...](#)

Manager Name First / Last: Billy Beeson GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Cert Mgr First / Last: Billy Beeson

Cert Mgr Number: Cert Mgr Expiration Date:

Cert Mgr Phone: (928) 853-6082 Ext: Type: Please Select v

* Next Survey Purpose: Please Select v

* Next Survey Date:

Introductory Comments

(Maximum characters: 4000)
You have 4000 characters left.

Save InProcess and Refresh

[Spell Check](#)

Page continues on next page.

1000

Save InProcess and Refresh Search for Deficiencies

Survey Form - Each Line Must Have A Selection							COS	Repeat
Line	In	Out	N/A	N/O	Description	Updated After Saving		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Person in charge present, demonstrates knowledge, and performs duties			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Certified Food Protection Manager			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Management, food employee and conditional employee; knowledge, responsibilities and reporting			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Proper use of restriction and exclusion			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Procedures for responding to vomiting and diarrheal events			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Proper eating, tasting, drinking, or tobacco use			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	No discharge from eyes, nose, and mouth			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Hands clean and properly washed			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No bare hand contact with RTE food or a pre-approved alternative procedure properly allowed			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Adequate handwashing sinks properly supplied and accessible			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Food obtained from approved source			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food received at proper temperature			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Food in good condition, safe, and unadulterated			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Required records available: shellstock tags, parasite destruction			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food separated and protected			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Food-contact surfaces; cleaned and sanitized			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Proper disposition of returned, previously served, reconditioned, and unsafe food			

🏠 **Food Samples Taken**

Add Row
✖

	Observation	Food Item	Location	Temperature
<input type="checkbox"/>	Please Select			<input type="text"/> F
<input type="checkbox"/>	Please Select			<input type="text"/> F
<input type="checkbox"/>	Please Select			<input type="text"/> F
<input type="checkbox"/>	Please Select			<input type="text"/> F
<input type="checkbox"/>	Please Select			<input type="text"/> F
<input type="checkbox"/>	Please Select			<input type="text"/> F

🏠 **Liquid Waste Sampling**

Date of Last EPA Sanitary Survey <input type="text"/>	Sampling-Phosphorous <input type="text"/>
Sampling-BOD <input type="text"/>	Sampling-pH <input type="text"/>
Sampling-Suspended Solids <input type="text"/>	Sampling-Flow Volume <input type="text"/>
Sampling-Fecal Coliform <input type="text"/>	Sampling-Oil and Grease <input type="text"/>
Sampling-Total Nitrogen <input type="text"/>	Sampling-Floatable Solids > Trace Amounts <input type="text"/>
	Lab Used for Sample Analysis <input type="text"/>

Comments

[Spell Check](#)

(Maximum characters: 2000)
You have characters left.

🏠 **Drinking Water Sampling**

Date of Last EPA Sanitary Survey <input type="text"/>	Date of Last CCR <input type="text"/>
Sampling-Coliform <input type="text"/>	Sampling-VOCs <input type="text"/>
Sampling-HAA5 & TTHM <input type="text"/>	Sampling-Disinfectant Residual <input type="text"/>
Sampling-Lead and Copper <input type="text"/>	Sampling-Turbidity <input type="text"/>
Sampling-Arsenic <input type="text"/>	Sampling-pH Level <input type="text"/>
Sampling-Radionuclides <input type="text"/>	Sampling-Flouride Concentration <input type="text"/>
Sampling-Inorganics <input type="text"/>	Sampling-Other(s) <input type="text"/>
Sampling-Nitrate <input type="text"/>	Lab Used for Sample Analysis <input type="text"/>

Comments

[Spell Check](#)

(Maximum characters: 2000)
You have characters left.

P/E/S/SS Information

*Program <input type="text" value="Please Select"/>	*Element <input type="text"/>
Sub Element <input type="text"/>	Sub-Sub Element <input type="text"/>

10 Essential Services Information

10 Essential Services: Primary <input type="text" value="Please Select"/>	
Secondary <input type="text" value="Please Select"/>	

Save/InProgress
Save/Finalized
Save/Finalized and Add Attachment

The Establishment / R/C/P Panel includes basic information about the establishment associated with the survey. This information appears exactly as it does in the establishment record and cannot be edited. This panel also has a cancel button to close the Add Survey page and return to the Surveys Show Table screen.

NOTE: A user cannot un-select an Establishment on the Add Survey page. If a user selects the wrong Establishment, she/he must Cancel and start over.

The Add Survey Panel allows the user to enter survey information. The EHS drop down list box will populate with the creating user’s name. The Latitude/Longitude and Manager Name First/Last fields will populate with values that are stored in those fields for the Establishment.

Add Survey

* Indicates required field

Survey Date 01/13/2023 Survey Type FDA 2017 Food Survey

* Survey Purpose Please Select *EHS [Barcode]

For definitions of Survey Purpose values, click the Survey Purpose label. Select item from list and click button to view a Survey Reference Document [View]

Score N/A Score [] Score entry is optional

Criticals Found

Time In [] []

Time Out [] []

Travel Time [] hrs [] min Latitude / Longitude [] [] [Google Map via Coordinates..](#)

Manager Name First / Last Billy Beeson GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Cert Mgr First / Last Billy Beeson

Cert Mgr Number [] Cert Mgr Expiration Date []

Cert Mgr Phone (928) 853-6082 Ext [] Type Please Select

* Next Survey Purpose Please Select

* Next Survey Date []

Introductory Comments [] [Spell Check](#)

(Maximum characters: 4000)
You have 4000 characters left.

Save InProcess and Refresh

If the user sets the value for Next Survey Purpose to “Routine,” WebEHRS will automatically calculate the Next Survey Date. The calculated date is not final; once the calculation is complete, the user has the option to edit the Next Survey Date.

NOTE: This calculation only occurs if the Establishment Type has a Survey Frequency interval in the database. Survey Frequency values are maintained by System Administrators. Contact your Area EH/IEH/IP for additional details.

NOTE: When the Survey is saved into the database, the Establishment record’s values will be updated to reflect the values entered on the Survey for these fields:

- Latitude/Longitude,

- *Manager Name First/Last,*
- *Next Survey Purpose,*
- *Next Survey Date.*

The Add Survey panel includes hyperlinks to helpful tools including description of surveys types, reference documents, and Google Map link. To use these tools:

1. Click the [Survey Purpose](#) link to view the descriptions of each purpose.
2. Select a Survey Reference Document from the drop-down, then click View.
3. Click the [Google Maps via coordinates...](#) link to view the establishment location via Google Map, if coordinate values are entered into the fields.

The screenshot shows the 'Add Survey' form with the following fields and values:

- Survey Date:** 01/13/2023
- Survey Type:** FDA 2017 Food Survey
- * Survey Purpose:** Routine (circled in red)
- * EHS:** (circled in red)
- Score N/A:** **Score:** **Score entry is optional**
- Criticals Found:**
- Time In:** 7:00 AM
- Time Out:** 9:15 AM
- Travel Time:** hrs min
- Latitude / Longitude:** [Google Map via Coordinates...](#)
- Manager Name First / Last:** Billy Beeson
- Cert Mgr First / Last:** Billy Beeson
- Cert Mgr Number:**
- Cert Mgr Phone:** (928) 853-6082
- Cert Mgr Expiration Date:**
- * Next Survey Purpose:** Please Select (circled in red)
- * Next Survey Date:** 05/13/2023 (circled in red)
- Introductory Comments:**
- Save InProcess and Refresh** (button)

The user should continue to enter information in other panels of the survey as needed.

The Survey Form allows the user to identify if a line item is in or out of compliance. When a line is out of compliance and **Out** is selected, a new window opens to detail the survey deficiency.

Save InProcess and Refresh		Search for Deficiencies								
Survey Form - Each Line Must Have A Selection										
Line	In	Out	N/A	N/O	Description	COS	Repeat			
							Updated After Saving			
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Person in charge present, demonstrates knowledge, and performs duties					
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Certified Food Protection Manager	X	X			
Survey Deficiency (to change a line from "Out" to anything else, all deficiency rows must be deleted)										
Add Row		X		For pre-defined canned comments, click the icon to the right of comments box.						
Deficiency Code(s)	Occ	COS	R	Corrected By	Comments					
2-102.12(A) - Certified Food Protection Manager	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	Immediately	Food Manager was called to come onsite immediately				
<input type="button" value="Spell Check"/>										
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Management, food employee and conditional employee; knowledge, responsibilities and reporting					
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Proper use of restriction and exclusion					
5	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Procedures for responding to vomiting and diarrheal events					
6	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Proper eating, tasting, drinking, or tobacco use					
7	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	No discharge from eyes, nose, and mouth					
8	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	Hands clean and properly washed					
9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No bare hand contact with RTE food or a pre-approved alternative procedure properly allowed					
10	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Adequate handwashing sinks properly supplied and accessible					
11	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Food obtained from approved source					
12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food received at proper temperature					
13	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Food in good condition, safe, and unadulterated					

To add a deficiency/violation:

1. Select a **Deficiency Code** from the drop down list box.
*NOTE: A short description of the **Violation Code** text displays in the row.*
2. Specify a value for **Occurrences**.
3. Select the **Repeat** and/or **Corrected On Site** check boxes if as needed.
*NOTE: The **Repeat** check box will be selected if the violation was marked out of compliance on the Establishment's most recent Survey. Clear the **Repeat** check box, if necessary.*
4. Optionally, confirm **No** or select **Yes** for P or PF.
*NOTE: Some non-critical violations can be marked **Critical**. If the violation selected has this option, the **Critical** drop down box is active. Contact your Area Supervisor for additional details.*
5. Select a value for **Corrected By**.
6. Type the **Comments**.
*NOTE: Click the Page Icon (to the right of the **Comments** text box) to populate the **Comments** box with a Predefined Comments entry. System Administrators maintain the values for Predefined Comments. Contact your Area EH/IEH/IP for additional details.*

To add more blank rows to the survey deficiency, click **Add Row**. To remove a deficiency, select the deficiency then click the red X.

9.3.1 AQUATIC VENUES

The **Aquatic Venues** button is only available for establishment types:

- 55.1 Small Aquatic Facilities
- 55.2 Large Aquatic Facilities

Edit Survey

* Indicates required field

Survey Date: 1/9/2026 Survey Type: CDC 2024 Model Aquatic Health Code * Active/Deleted: Active

* Survey Purpose: Please Select * EHS: Feltenberger, Timmy

For definitions of Survey Purpose values, click the Survey Purpose label. Select item from list and click button to view a Survey Reference Document View

Score N/A Score: Score entry is optional

Criticals Found: 0

Time In: Time Out:

Travel Time: hrs min Latitude: Longitude: [Google Map via Coordinates](#)

Manager First Name: Manager Last Name: GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

Certified Manager: First Name: Last Name:

Certified Manager Number: Certified Manager Expiration Date:

Certified Manager Phone: Ext.: Type: Please Select

* Next Survey Purpose: Please Select * Next Survey Date:

Introductory Comments
(Maximum characters: 4000)
You have 4000 characters left.

[Save InProcess and Refresh](#)

Aquatic Venues Deficiencies

A pop-up window opens when the **Aquatic Venues** button is clicked. Click the **Add Row** button to create an aquatic venue row below the aquatic venue drop-down list:

Aquatic Venues

Active/Deleted: Active

Add Row Establishment Type: 55.1 Small Aquatic Facilities

Venue Number	* Description	* Operation Status	* Record Status
Current Establishment Venues			
<input type="text"/>			

BOGUE HOMA SWIMMING POOL

[Save/Close](#) [Cancel/Close](#)

If the aquatic venue is not in the drop-down list, create a new aquatic venue by clicking the **Add New Est Venue** button:

*** Indicates required field**

Aquatic Venues

Active/Deleted: Active

Add Row Establishment Type: 55.1 Small Aquatic Facilities

Venue Number Current Establishment Venues	* Description	* Operation Status	* Record Status
X Please Select Add New Est Venue			

Save/Close Cancel/Close

Enter the following information for each aquatic venue:

*** Indicates required field**

Aquatic Venues

Active/Deleted: Active

Add Row Establishment Type: 55.1 Small Aquatic Facilities

Venue Number Current Establishment Venues	* Description	* Operation Status	* Record Status
X 4 Please Select	East Pool	Open	Active

Air Temp (°F) _____ Chlorine - Free (PPM) _____ pH _____
 Water Temp (°F) _____ Chlorine - Combined (PPM) _____ Total Alkalinity (PPM) _____
 Flow (GPM) _____ Chlorine - Total (PPM) _____ Calcium Hardness (PPM) _____
 Free Bromine (PPM) _____ Cyanuric Acid (PPM) _____

Establishment Type Validation:

- Select **55.1 – Small Aquatic Facilities** when the establishment has **four or fewer venues**.
- Select **55.2 – Large Aquatic Facilities** when the establishment has **five or more venues**.

*** Indicates required field**

Aquatic Venues

Active/Deleted: Active

Add Row Establishment Type: 55.1 Small Aquatic Facilities

Venue Number Current Establishment Venues	* Description	* Operation Status	* Record Status
X 4 Please Select	East Pool	Open	Active

Air Temp (°F) _____ Chlorine - Free (PPM) _____ pH _____
 Water Temp (°F) _____ Chlorine - Combined (PPM) _____ Total Alkalinity (PPM) _____
 Flow (GPM) _____ Chlorine - Total (PPM) _____ Calcium Hardness (PPM) _____
 Free Bromine (PPM) _____ Cyanuric Acid (PPM) _____

After the aquatic venue inspection date has been set, click the **Save/Close** button. The pop-up window closes, and you are returned to the survey page. A green check mark displays on the **Aquatic Venues** button to indicate the aquatic venue portion of the survey has been completed.

Click the **Aquatic Venues** button to reopen the pop-up window and **edit or update** the aquatic venue inspection data as needed.

9.3.2 DEFICIENCY SEARCH

Deficiencies can be searched for to quickly locate relevant line items that are out of compliance.

To search for a deficiency, click Search for Deficiencies from the Add or Edit Survey page.

Line	In	Out	N/A	N/O	Description	COS	Repeat
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person in charge present, demonstrates knowledge, and performs duties		
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Certified Food Protection Manager	X	X

A new window will open which allows users to search for deficiencies by Deficiency Code, Line Number/Description, or Deficiency Description.

Deficiency Search		
Survey Type	FDA 2022 Food Survey	Deficiency Code
Line #/Description	All	Deficiency Description
<div style="text-align: right;"> Search Clear </div>		
<div style="text-align: center;"> 1 of 36 356 Items 10 / Page </div>		
Line #/Description	Code	Deficiency Description
1 - Person in charge present, demonstrates knowledge, and perfor...	2-101.11	Assignment [Pf]
1 - Person in charge present, demonstrates knowledge, and perfor...	2-103.11(A)-(P)	Person-In-Charge-Duties [Pf]
1 - Person in charge present, demonstrates knowledge, and perfor...	2-102.11(A)(B)	Demonstration (also includes 2-102.11(C)(1),(4)-(16)) [Pf]
2 - Certified Food Protection Manager	2-102.12(A)	Certified Food Protection Manager
3 - Management, food employee and conditional employee; knowledg...	2-102.11(C2)	Demonstration (also includes (3) and (17)) [Pf]
3 - Management, food employee and conditional employee; knowledg...	2-201.11(A)	Responsibility of Permit Holder, Person in Charge, and Conditional Employees (also Includes (B), (C), & (E)) [Pf] and [Pf]
3 - Management, food employee and conditional employee; knowledg...	2-103.11(O)	Person in Charge-Duties [Pf]
4 - Proper use of restriction and exclusion	2-201.11(D)(F)	Responsibility of Permit Holder, Person in Charge, and Conditional Employees-Responsibility of the PIC to Exclude or Restrict [P]
4 - Proper use of restriction and exclusion	2-201.13	Removal, Adjustment, or Retention of Exclusions & Restrictions [P]
4 - Proper use of restriction and exclusion	2-201.12	Exclusions & Restrictions [P]

9.3.2.1 SEARCHING FOR DEFICIENCIES BY DEFICIENCY CODE

To search for a deficiency by deficiency code, enter the code or partial code in the Deficiency Code field, then click Search.

Any deficiencies matching that Deficiency Code will appear highlighted in the search results.

Deficiency Search		
Survey Type	FDA 2017 Food Survey	Deficiency Code
Line #/Description	All	Deficiency Description
<div style="text-align: right;"> Search Clear </div>		
<div style="text-align: center;"> 1 of 1 2 Items 10 / Page </div>		
Line #/Description	Code	Deficiency Description
1 - Person in charge present, demonstrates knowledge, and perfor...	2-103.11(A)-(P)	Person-In-Charge-Duties [Pf]
3 - Management, food employee and conditional employee; knowledg...	2-103.11(O)	Person in Charge-Duties [Pf]

9.3.2.2 SEARCHING FOR DEFICIENCIES BY LINE NUMBER

To search for a deficiency by line number/description, select the line number from the Line #/Description drop-down, then click Search.

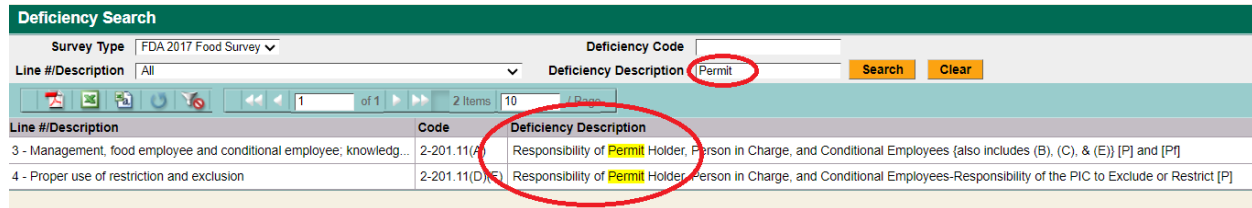
Any deficiencies matching that Line #/Description will appear in the search results.

Deficiency Search		
Survey Type	FDA 2017 Food Survey	Deficiency Code
Line #/Description	2 - Certified Food Protection Manager	Deficiency Description
<div style="text-align: right;"> Search Clear </div>		
<div style="text-align: center;"> 1 of 1 1 Items 10 / Page </div>		
Line #/Description	Code	Deficiency Description
2 - Certified Food Protection Manager	2-102.12(A)	Certified Food Protection Manager

9.3.2.3 SEARCHING FOR DEFICIENCIES BY DESCRIPTION

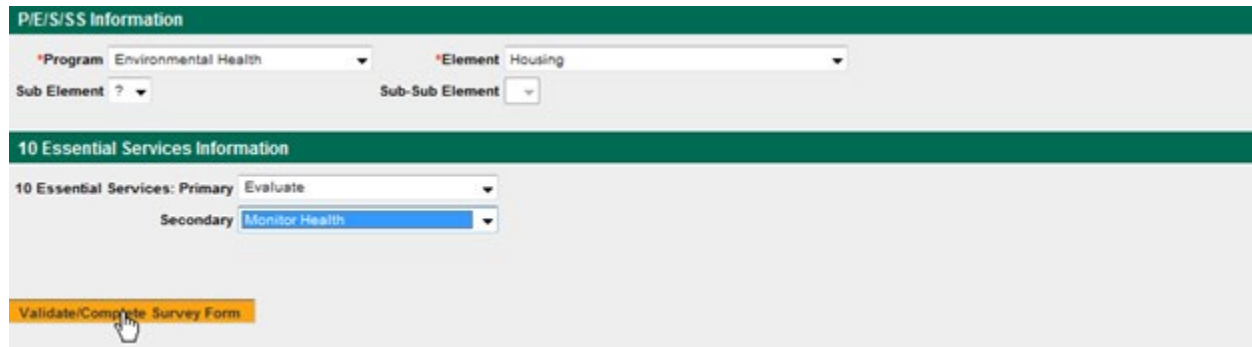
To search for deficiencies by deficiency description, enter the description or partial description in the Deficiency Description field, then click Search.

Any deficiencies matching that Deficiency Description will appear highlighted in the search results.



Additional panels on the Survey page include Program, Element, and Essential Services. To enter information:

1. Select Program from dropdown.
2. Select Element from dropdown.
3. Select Sub Element & Sub-Sub Element from dropdown. (OPTIONAL)
4. Select 10 Essential Services from dropdown. (OPTIONAL)



After the survey information is entered, click on the Validate/Confirm Survey Form button.

WebEHRS will display all violation rows for the Survey Type. Violations that were entered in the Violations Panel will be marked with an x for the In or Out column. The user should review the information and make modifications as needed. (NOTE: If a violation was not marked as Out, WebEHRS automatically sets it as In. N/A or N/O may be a more appropriate designation. This is the time to make those changes.)

1. Click on the Save/Inprocess or Save/Finalized button to save the Survey and return to the Show Table screen.
2. Click Save/Finalized and Add Attachment to save and finalize the survey and add an attachment.
3. Click on the Cancel button to return to the Show Table screen without saving.

Save/InProgress Save/Finalized Cancel Required Fields are only 'required' for Save/Finalized.							
Line	In	Out	N/A	N/O	Description	COS	Repeat
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Every sleeping room and living area, primary and secondary means of escape unobstructed		
2		x	<input type="checkbox"/>	<input type="checkbox"/>	Smoke alarms, min. 1 per level; adjacent to bedrooms; 1 per bedroom or living area	x	
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Indoor smoking prohibited; candle use; other ignition risks		
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fire extinguisher(s) available		
5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Family fire evacuation plan; emergency phone numbers		
6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All poisons/toxics labeled, stored, and safely used; emergency numbers posted		

9.4 VIEW/SHOW TABLE AND SURVEY ICONS AND LINKS

In the Surveys Show Table screen, the user may:

- View, scan, and manage documents associated with a survey using the DMS icons,
- View surveys using the magnify icon,
- Edit a survey using the edit icon,
- View/Print a PDF of the Survey Form using the Printer icon,
- Navigate to the Establishments or Activities using the links in the table,
- Add a new Survey, or
- View the Audit history of a Survey.

Add New Audit											
Date Survey Performed	Estab. Name Estab. Type	R/C/P Title	Survey Type	Survey Purpose	Survey Status Date Finalized	EHS	Origin	Create User Update User	Setup Date Update Date	Active/Deleted	
11/30/2011	SNOPPY'S CAFE 47 Cafe/Restaurant		FDA 2001 Food Survey	Pre-Operational	InProcess	Brown, Charlie	IMS	VGray VGray	11/30/2011 11/30/2011	Active	

9.4.1 DOCUMENT MANAGEMENT SYSTEM PAGE AND SCANNER ICONS

To view scanned documents associated with the survey:

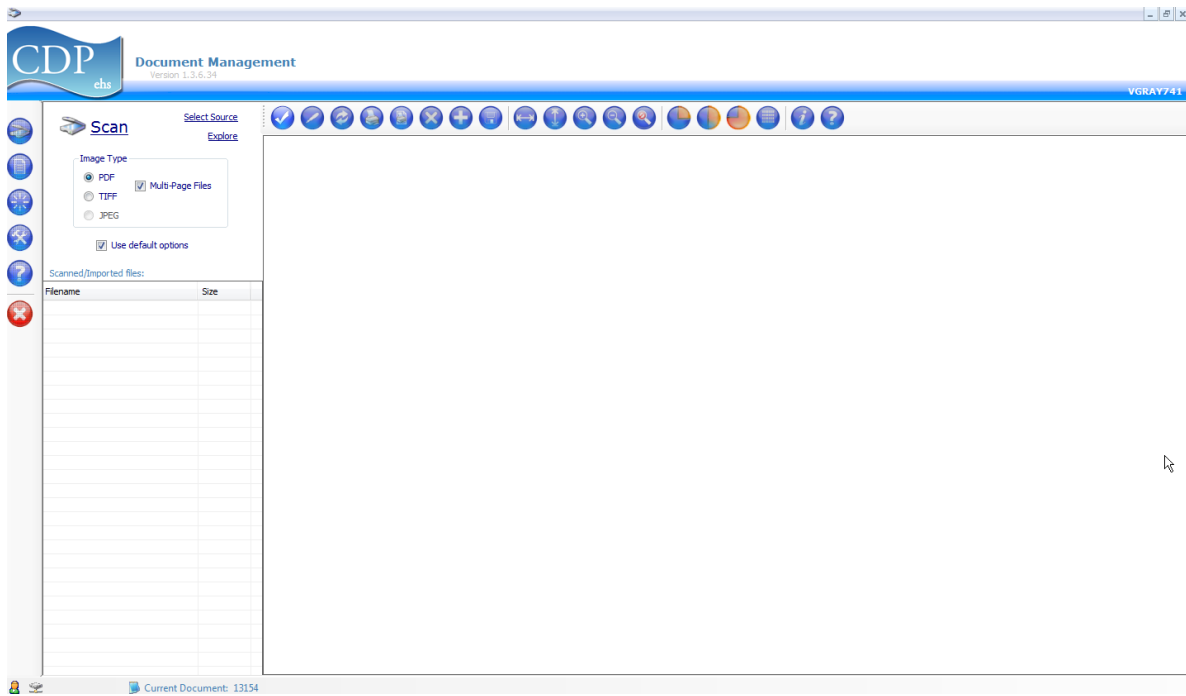
1. Click on the page icon (icon on the far left column).

Note: The page icon (to view existing documents) will not appear until at least one document has been added to the Survey.

To add documents associated with the survey:

2. Click on the scanner icon.

WebEHRS opens the CDP Document Management (DMS) system and allows the user to scan/import, view, and manage documents associated with-the survey.




For additional information about the DMS application, refer to Appendix D – CDPehs Document Management System.

9.4.2 VIEW SURVEY RECORD ICON

The users can edit an existing establishment by clicking on the edit icon next to the survey in the Show Table results:

1. Click on the edit icon.

	Date Survey Performed	Estab. Name Estab. Type	R/C/P Title	Survey Type	Survey Purpose	Survey Status Date Finalized	EHS	Origin	Create User Update User	Setup Date Update Date	Active/Deleted
	11/30/2011	SNOOPY'S CAFE 47 Cafe/Restaurant		FDA 2001 Food Survey View Activities	Pre-Operational	InProcess	Pattie, Peppermint	IMS	VGray VGray	11/30/2011 12/2/2011	Active

WebEHRS opens the View Survey screen with data for the survey populated.

Establishment OK

Name/Address SNOOPY'S CAFE 4400 N. CENTRAL AVE PHOENIX, Arizona 85013	Establishment Type 47 Cafe/Restaurant	Next Survey Due 8/1/2012	R/C/P Title	R/C/P #
---	---	------------------------------------	--------------------	----------------

Show Survey

Survey Date 11/30/2011 Survey Type FDA 2001 Food Sur: Active/Deleted Active

*Survey Purpose Pre-Operational EHS Pattie,Peppermint

For definitions of Survey Purpose values, click the Survey Purpose label. Click [here](#) for Survey Reference Document

Score N/A Score 92 Score entry is optional

Criticals Found

Time In 3 :30
Time Out 4 :30

Travel Time Latitude / Longitude

Manager Name First / Last BROWN GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

*Next Survey Purpose Routine
*Next Survey Date 05/30/2012
Comments This is the first survey for this operation.

Violations

Viol Code	Occurrences	Repeat	Corrected On Site	Critical	Corrected By	Comments
		<input type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>			
Utensils, equipment, linens, properly stored, dried, handled	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	No	2	Utensils were found face-up and uncovered.
Garbage, refuse properly disposed: facilities maintained	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	No	2	Gate was unlatched.

To return to the Show Table Screen:

4. Click on the Ok button.

9.4.3 EDIT SURVEY ICON

The users can edit an existing establishment by clicking on the edit icon next to the survey in the Show Table results:

1. Click on the edit icon button.

	Date Survey Performed	Estab. Name Estab. Type	R/C/P Title	Survey Type	Survey Purpose	Survey Status Date Finalized	EHS	Origin	Create User Update User	Setup Date Update Date	Active/Deleted
	11/30/2011	SNOOPY'S CAFE 47 Cafe/Restaurant		FDA 2001 Food Survey View Activities	Pre-Operational	InProcess	Gray, Violet	IMS	VGray VGray	11/30/2011 12/2/2011	Active

WebEHRS opens the Edit Survey screen with data for the survey populated. Some Survey Types will show additional panels for sampling results

To return to the show table screen, click on the Cancel button.

NOTE: If the user needs to change the Establishment that the Survey is associated with, this cannot be done. Once an Establishment has been selected, it cannot be removed. To change the Establishment, the user should:

1. Change the existing Survey's Active/Deleted to Deleted and Save.
2. Create a new Survey record for the correct Establishment.

Establishment				
Name/Address	Establishment Type	Next Survey Due	R/C/P Title	R/C/P #
SNOOPY'S CAFE 4400 N. CENTRAL AVE PHOENIX, Arizona 85013	47 Cafe/Restaurant	11/21/2011		

All other panels on the Edit Survey screen will allow the user to edit the survey data. Similar to the Add Survey screen, any changes made to the following fields will also be made for the associated Establishment record:

- Latitude/Longitude
- Manager Name First/Last
- Next Survey Purpose
- Next Survey Date

Edit Survey

* Indicates required field

*Survey Date: 11/30/2011 13 *Survey Type: FDA 2001 Food Survey *Active/Deleted: Active

*Survey Purpose: Pre-Operational *EHS: Pattie, Peppermint

For definitions of Survey Purpose values, click [here](#) for Survey Reference Document

Score N/A Score: 92 Score entry is optional

Criticals Found

Time In: 3 : 30

Time Out: 4 : 30

Travel Time: hrs min Latitude / Longitude: [Google Map via Coordinates..](#)

Manager Name First / Last: SNOOPY BROWN GPS coordinates should be in decimal degrees (Ex: Latitude 38.19802 Longitude -84.86261)

*Next Survey Purpose: Routine

*Next Survey Date: 05/30/2012 13

Comments:

(Maximum characters: 4000)
You have 4000 characters left.

Add New Audit Print Word Excel PDF Refresh 1 of 1 1 Items 10 /Page Go												
<input type="checkbox"/>	Date Survey Performed	Estab. Name Estab. Type	R/C/P Title	Survey Type	Survey Purpose	Survey Status Date Finalized	EHS	Origin	Create User Update User	Setup Date Update Date	Active/Deleted	
	11/30/2011	SNOOPY'S CAFE 47 Cafe/Restaurant		FDA 2001 Food Survey View Activities	Pre-Operational	InProcess	Pattie, Peppermint	IMS	VGray VGray	11/30/2011 12/2/2011	Active	

WebEHRS opens a new window in the user’s internet browser. The new window will display an image of the survey using the Crystal Report Viewer. The user may view, export, or print the Survey Form from the Crystal Report Viewer.

2. Click on the pagination arrows to view additional pages within the image.
3. Modify the Zoom Percentage value to view a larger/smaller image.
4. Click on the diskette icon in upper right section of the window to Export the report into a different format.
5. Click on the printer icon to print the Survey.

9.4.5 SURVEY MENU ICONS & LINKS

The Surveys Show Table screen has many tools to assist the user in managing Survey records.

To view/edit the Establishment record associated with the Survey:

1. Click on the Establishment Name link.

WebEHRS will open the Establishments Show Table screen showing only the associated Establishment.

To view Activities associated with the Establishment record: select one or more surveys, the user will:

2. Click on the View Activities link.

Date Survey Performed	Estab. Name Estab. Type	R/C/P Title	Survey Type	Survey Purpose	Survey Status Date Finalized	EHS	Origin	Create User Update User	Setup Date Update Date	Active/Deleted
11/30/2011	SNOOPY'S CAFE Cafe/Restaurant		FDA 2001 Food Survey View Activities	Pre-Operational	InProcess	Pattie, Peppermint	IMS	VGray VGray	11/30/2011 12/2/2011	Active

WebEHRS will open the Activities by Establishments show table screen, showing all existing Activities associated to the Establishment.

9.4.6 CREATE NEW

To add a new survey from the Surveys Show Table screen:

- Click on the Add New button.

Date Survey Performed	Estab. Name Estab. Type	R/C/P Title	Survey Type	Survey Purpose	Survey Status Date Finalized	EHS	Origin	Create User Update User	Setup Date Update Date	Active/Deleted
11/30/2011	SNOOPY'S CAFE Cafe/Restaurant		FDA 2001 Food Survey View Activities	Pre-Operational	InProcess	Pattie, Peppermint	IMS	VGray VGray	11/30/2011 12/2/2011	Active

WebEHRS will open the Add Survey screen for the user to create a new survey.

Establishment Cancel

[Establishment Lookup...](#) [R/C/P Lookup...](#)

Name/Address	Establishment Type	Next Survey Due
		R/C/P Title
		R/C/P #

Add Survey

* Indicates required field

*Survey Date /"/> *Survey Type Continue

Enter a survey date, select a survey type and click Continue to display the full Add Survey page.

- Click on the [Establishment Lookup link](#).

WebEHRS displays an establishment lookup screen for the user to search and select an establishment: *NOTE: If an establishment has already been selected, this link will not display. An establishment must be selected to proceed with adding a new survey.*

- Enter search criteria.
- Click on the Search button.
- Click on the Select link for the desired establishment.

Establishment Lookup

Use the fields below for ad-hoc filtering. Select an Establishment record or click on the red X to close this window.

Areas/SU's

- All
- ABERDEEN / BISMARCK
- ABERDEEN / CHEYENNE RIVER
- ABERDEEN / CROW CREEK

Reservations

- All
- ACOMA
- AK-CHIN MARICOPA
- ALABAMA COUSHATTA LIVINGSTON TEXAS

Address containing: City:

SU's/Communities

Tribes

- All
- ABSENTEE-SHAWNEE TRIBE, OK
- AFOGNAK
- AGUA-CALIENTE BAND CAHUILLA INDIANS, CA

Service Type:

Establishment Name containing:

Establishment Type

- All
- 01 Comprehensive Health Care Referral Facility
- 02.1 Hospital w/ Surgery w/ DEHS Funded Safety Officer
- 02.2 Hospital w/ Surgery and No DEHS Funded Safety Officer
- 02.3 Hospital w/o Surgery /w DEHS Funded Safety Officer
- 02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Office
- 03.1 Health Center w/ DEHS Funded Safety Officer
- 03.2 Health Center w/ no DEHS Funded Safety Officer
- 04 School Health Center
- 05 Health Station

Active/Deleted:

Additional Search Options

RRM Status:

Risk Type:

Establishment #:

Estab. Status:

A1:

A2:

District:

1 of 1 2 Items 10 /Page Go

Name	Estab. Type	Address 1	City / ST / ZIP
Select SNOOPY'S BAKER AND COFFEE SHOP	42 Bakery, Cannery, Bottling	4400 N CENTRAL AVE	PHOENIX Arizona 85013
Select SNOOPY'S CAFE	47 Cafe/Restaurant	4400 N. CENTRAL AVE	PHOENIX Arizona 85013

WebEHRS returns to the Add Survey page with the Establishment demographics showing in the Establishment panel.

- Enter the Survey Date.
- Select a Survey Type.
- Click Continue.

WebEHRS will open the remaining panels for the Survey record. Enter the Survey information and click on Save to create this survey.

Establishment

[R/C/P Lookup...](#)

Name/Address	Establishment Type	Next Survey Due	R/C/P Title	R/C/P #
SNOOPY'S BAKER AND COFFEE SHOP 4400 N CENTRAL AVE PHOENIXAZ 85013	42 Bakery, Cannery, Bottling			

Add Survey

* Indicates required field

*Survey Date:

*Survey Type:

Enter a survey date, select a survey type and click Continue to display the full Add Survey page.

9.4.7 AUDITS

To view a detailed Audit History of the Survey record:

3. Use the checkbox to select the desired Establishment from the Show Table panel.
4. Click on the Audit button.

Date Survey Performed	Estab. Name Estab. Type	R/C/P Title	Survey Type	Survey Purpose	Survey Status Date Finalized	EHS	Origin	Create User Update User	Setup Date Update Date	Active/Deleted
11/30/2011	SNOOPY'S CAFE 47 Cafe/Restaurant		FDA 2001 Food Survey	Pre-Operational	InProcess	Pattie, Peppermint	IMS	VGray VGray	11/30/2011 12/2/2011	Active

WebEHRS opens the Audit screen in a new window. The user can expand and collapse the information by using the plus and minus icon on the far left column of the row.

Auditing- Survey Record # 1081

Estab. Name SNOOPY'S CAFE Survey Date 11/30/2011

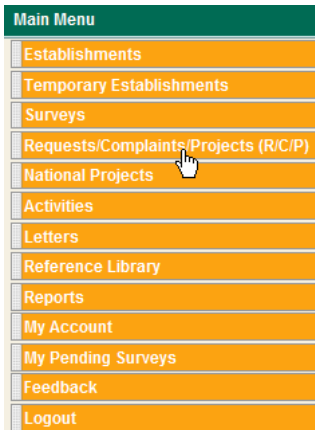
Change Date	Action	User Name									
12/2/2011 3:20:53 PM	UPDATE	Viollet Gray									
<div style="border: 1px solid gray; padding: 5px;"> <p>Details</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Column Name</th> <th>Before Value</th> <th>After Value</th> </tr> </thead> <tbody> <tr> <td>EHS_USER_ID</td> <td>741</td> <td>734</td> </tr> </tbody> </table> </div>			Column Name	Before Value	After Value	EHS_USER_ID	741	734			
Column Name	Before Value	After Value									
EHS_USER_ID	741	734									
12/2/2011 2:45:43 PM	UPDATE	Viollet Gray									
<div style="border: 1px solid gray; padding: 5px;"> <p>Details</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Column Name</th> <th>Before Value</th> <th>After Value</th> </tr> </thead> <tbody> <tr> <td>CERT_MGR_FIRST_NAME</td> <td>SNOOPY</td> <td>SNOOPY</td> </tr> <tr> <td>EHS_USER_ID</td> <td>740</td> <td>741</td> </tr> </tbody> </table> </div>			Column Name	Before Value	After Value	CERT_MGR_FIRST_NAME	SNOOPY	SNOOPY	EHS_USER_ID	740	741
Column Name	Before Value	After Value									
CERT_MGR_FIRST_NAME	SNOOPY	SNOOPY									
EHS_USER_ID	740	741									

10 REQUESTS/COMPLAINTS/PROJECTS (R/C/P)

The Requests/Complaints/Projects (R/C/P) module allows users to search, view, edit, and create requests, complaints, and projects. This Module also provides tools to assist the user to manage: relationships between R/C/Ps and establishments; documents stored in WebEHRS; and other information related to the R/C/Ps.

The R/C/P module can be accessed from the Main Menu or from the Main Menu Bar within other modules. To navigate to the R/C/P module from the Main Menu:

1. Click Request/Complaints/Projects (R/C/P).



The main screen for R/C/P includes multiple panels:

- The top panel is the My Filters and basic search options.
- The middle panel is Additional Search Options, Search to execute a search, Clear to clear the search criteria and results.
- A Menu separates the Search panel from the results set. Menu buttons appear in the panel depending upon the user permissions.
- The Show Table provides the user with a listing of search results and additional tools.

10.1 SEARCH

The R/C/P Show Table Screen allows users to query the database for requests, complaints, and projects. As shown in other sections of this User Guide, My Filters can be used to perform common searches.

To apply a My Filters:

1. Select a My Filter value from the My Filters drop down list box.
2. Click on the Search button.

NOTE: Additional detailed information about Filters and how to best use filters is provided in Appendix C – Using Filters in WebEHRS.

Alternatively, a user can choose to query the database using any combination of the filters available for a R/C/P query. In the sample image (below), when the R/C/P Show Table Screen initially loads, all filters will be set to All. Queries can be performed to see All records, but most searches will be performed with one or more filters selected to return a manageable result set.

NOTE: The search filters pick list boxes for Areas/SU's, SU's/Communities, Estab. Types, Reservations and Tribes populate with values based upon the user account's permissions (Data Filters).

To apply a Search:

1. Enter or select the search criteria in dropdowns and text boxes.
2. Click on the Search button.

NOTE: If you want to search on “SU’s/Communities,” you must first select one or more Areas/SU’s and click on the Apply Areas button.

The top panel of Search Filters is general and applies to all modules within WebEHRS. The “Additional Search Options” panel contains data for building queries that are specific to the R/C/P record type.

For the R/C/P Module, Additional Search Options include:

- R/C/P Type,
- Supplemental R/C/P type,
- R/C/P Status,
- R/C/P Title containing,
- R/C/P Date Range,
- R/C/P Number,
- Location Person/Premise containing,
- EHS,
- Estab. Number,
- R/C/P Contact containing, and
- Open/Closed.

10.2 VIEW R/C/P BY ESTABLISHMENT

WebEHRS can show all R/C/Ps for a given establishment, if accessed from the Establishment module.

To select an establishment from the Establishments module:

1. Select Establishment or Temporary Establishment from the Main Menu.
2. Use the search filters to identify the desired Establishment.

3. Click on the Search button.

WebEHRS performs the search based on the filters and returns results in the Show Table panel.

1. Select an establishment using the check box.
2. Click the R/C/P button.

Estab. #	Estab. Type	Premise Name	Address	City/ST/ZIP	Primary Phone	Alt. Phone	Email	Owner Name	Address	City/ST/ZIP	Active/Deleted	Risk Type	EHS Last Survey Date	Permit #	Created By	Updated By	Created On	Last Updated	Google Map
6000470001	47 Cafe/Restaurant	KENNY'S TEST CAFE	123 DOES NOT EXIST STREET	PHOENIX Arizona 85004	(602) 364-5078			123 DOES NOT EXIST STREET	PHOENIX Arizona 85004		Active	Category I - High Open	2/14/2014				8/13/2013	5/19/2017	

WebEHRS displays a screen showing all R/C/Ps for the selected Establishment.

In the Establishment panel, the screen displays the name, address, establishment type, and next survey due date in the establishment panel. The R/C/P history is displayed in the R/C/P's panel including R/C/P date, resolved date, R/C/P type, supplemental type, R/C/P status, R/C/P title, R/C/P contact, the created by and update by and dates, and active/deleted status.

From the R/C/P module, to view an existing R/C/P for a specific establishment:

1. Enter all or a portion of an Establishment Name in the “Estab. Name containing” text box.
2. Click on the Search button.

R/C/P-Requests/Complaints/Projects

My Filters Please Select [Add/Edit My Filters](#) Use the fields below for ad-hoc filtering. Click "Add/Edit My Filters" to save the current filtering options.

Estab. Name containing

Areas/SU's: **Apply Areas**

Reservations:

Address containing City

Service Type Active/Deleted

Additional Search Options

R/C/P Type Supplemental R/C/P Type R/C/P Status

R/C/P Title containing R/C/P Date Range From: Thru: R/C/P Number

Location Person/Premise containing EHS Estab. Number

R/C/P Contact containing Open/Closed **Search** **Clear**

WebEHRS applies the search criteria and displays any associated R/C/Ps in the Show Table panel.

Add New Copy Print Worksheet Attachments											
Surveys Activities Foodborne Illness Product Mortgage Well Wastewater Lead Comments Audit											
<input type="checkbox"/>	R/C/P Date Resolved	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted	
	6/28/2017	Request Final	Food Product Incident			Test Request Smith, John	Open Open/Close		6/28/2017 6/28/2017	Active	

10.3 VIEW/SHOW R/C/P ICONS AND LINKS

In the Show Table panel, the user can view, edit, or select the R/C/P to perform one of the functions in the Menu Icon panel. The user may also view documents associated with the R/C/P.

10.3.1 VIEW R/C/P

After a search is executed, the user may also view any of the returned R/C/Ps. To view a R/C/P:

1. Select the magnifier icon for the desired R/C/P.

Add New Copy Print Worksheet Attachments											
Surveys Activities Foodborne Illness Product Mortgage Well Wastewater Lead Comments Audit											
<input type="checkbox"/>	R/C/P Date Resolved	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted	
	6/28/2017	Request Final	Food Product Incident			Test Request Smith, John	Open Open/Close		6/28/2017 6/28/2017	Active	

WebEHRS opens a new screen with a summary of information for the selected R/C/P including any comments.

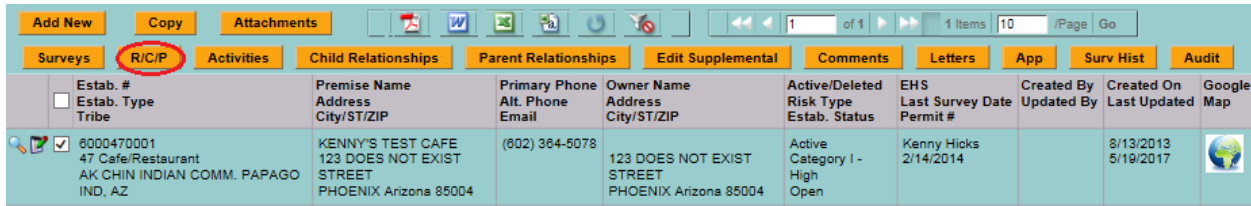
View R/C/P (Request/Complaint/Project) OK			
Establishment	JOE COOL'S SUMMER CAMP		
Area	PHOENIX	Service Unit	COLORADO RIVER
Reservation	CHEMEHUEVI	Tribe	CHEMEHUEVI TRIBE,CHEMEHUEVI RES, CA
R/C/P Number	345	R/C/P Status	Finalized
R/C/P Date	12/6/2011	Time	1:00 PM
Received By	Peppermit Pattie		
Request Method	Phone	Assigned EHS	Brown, Charlie
R/C/P Type	Complaint	Supplemental R/C/P Type	None
R/C/P Description	Unsanitary condicions including standing water.		
R/C/P Title	UNSANITARY CONDITIONS JOE COOL CAMP		
Location			
Person/Premise	JOE COOL'S SUMMER CAMP		
Address 1	44009 LAKE HAVASU RD		
Address 2			
City	LAKE HAVASU	State	California
ZIP Code	92363		
R/C/P Contact Information (Requestor, Complainant or Project Contact)			
First Name	CONCERNED	Last Name	PARENT
Address 1			
Address 2			
City		State	
ZIP Code			
Primary Phone	(502) 695-1999	Ext.	
Type			
Name			
Alternate Phone	Ext.	Type	
Name			
Fax			
Email			
Conditions			
Owner or Occupant Involved			
First Name			Last Name
Address 1			
Address 2			
City		State	
ZIP Code			
Primary Phone	Ext.	Type	
Name			
Alternate Phone	Ext.	Type	
Name			
Initial Action			
Initial Action Taken On	12/6/2011	Taken By	P PATTIE
Findings for R/C/P			
ASSIGN TO FIELD STAFF TO PERFORM INVESTIGATION.			
Referred to	CHARLIE BROWN	Date Referred	12/6/2011
Date Closed	12/9/2011		
Notification	Yes		
P/E/S/SS Information			
Program	Institutional Environmental Health	Element	Environmental Issues
Sub Element			
Sub-Sub Element			
10 Essential Services Information			
10 Essential Services: Primary			
Secondary			
Created By	PPattie	Updated By	PKothapalli
Created On	12/6/2011	Last Updated	12/14/2011
Comment			
OK			

The user has the option to view the R/C/P or click OK to close the window and return to the R/C/P Show Table Screen. The summary can be printed if needed using the print page icon on the user's Internet browser.

10.4 ADD R/C/P FROM ESTABLISHMENT MODULE

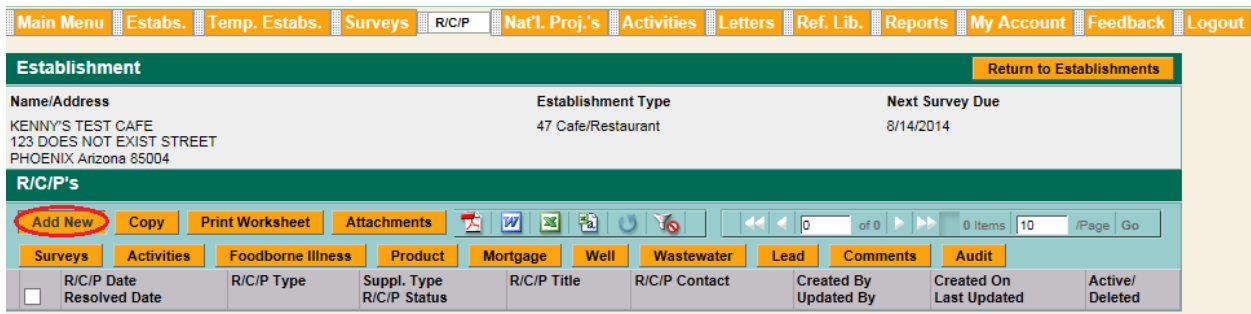
To add an R/C/P from the Establishments module:

1. Click on Establishments from the Main Menu or the Menu Bar.
2. Perform a search query to return the desired establishment.
3. Select the establishment with the check box.
4. Click on the R/C/P button.



WebEHRS navigates to R/C/P Show Table Screen and displays the demographics of the Establishment record and all existing R/C/Ps for the Establishment. To create a new R/C/P for this Establishment:

1. Click on the Add New button.



WebEHRS opens the Add R/C/P screen for the selected Establishment. The screen for Add R/C/P has multiple panels including the following:

- Add R/C/P (Request/Complaints/Projects),
- Location,
- R/C/P Contact Information,
- Owner or Occupant Involved,
- Initial Action,
- Findings for R/C/P,

- P/E/S/SS,
- 10 Essential Elements,
- Comments, Save or Cancel.

The Add R/C/P Panel includes basic information about the establishment associated with the new complaint. This information appears exactly as it does in the establishment record and cannot be edited. This panel also has a cancel button to close the Add R/C/P page and return the user to the Establishment Show Table page.

To return to the R/C/P Show Table screen, click on the Cancel button.

To continue with the R/C/P, enter the information wanted:

1. Enter information or select from dropdowns for all required fields.
2. Enter for R/C/P Date.
3. Select Assigned to from dropdown.
4. Select R/C/P Type from the dropdown.
5. Select Supplemental Type.
6. Enter R/C/P Title.

Add R/C/P (Request/Complaint/Project) Cancel

* Indicates required field

Establishment **JOE COOL'S SUMMER CAMP** [Reset Establishment](#)

*Area PHOENIX Service Unit COLORADO RIVER Community CHEMEHUEVI VALLEY

Reservation CHEMEHUEVI Tribe CHEMEHUEVI TRIBE, CHEMEHUEVI RES, CA

R/C/P Number

*R/C/P Date Time

Received By

Request Method Please Select *Assigned EHS Gray, Violet

*R/C/P Type Please Select *Supplemental R/C/P Type Please Select *R/C/P Title

R/C/P Description

If an Establishment is linked to the new R/C/P, the Location Panel fields are populated from the Establishment and are locked from editing.

The R/C/P Contact Information allows the user to enter contact information for the person that submits a complaint. First name and Last Name are required. All other information is optional.

- Enter First Name by typing name.
- Enter Last Name by typing name.

Location

Person/Premise: JOE COOL'S SUMMER CAMP

Address 1: 44009 LAKE HAVASU RD

Address 2:

City: LAKE HAVASU State: California ZIP Code: 92363

R/C/P Contact Information (Requestor, Complainant or Project Contact)

*First Name / Last Name: CONCERNED PARENT

Address 1:

Address 2:

City: State: Please Select ZIP Code:

Primary Phone: (502) 695-1999 Ext. Type Name

Alternate Phone: () - - - - Ext. Type Name

Fax: () - - - - Email:

Conditions:

➤ Continue entering optional information as necessary using dropdowns and text boxes.

Owner or Occupant Involved Check here if same as location

First Name / Last Name:

Address 1: 44009 LAKE HAVASU RD

Address 2:

City: LAKE HAVASU State: California ZIP Code: 92363

Primary Phone: () - - - - Ext. Type Name

Secondary Phone: () - - - - Ext. Type Name

Initial Action

Init Act Taken Date: 12/06/2011 Init Act Taken By: P Pattie

Findings for R/C/P

ASSIGNED FIELD STAFF TO PERFORM INVESTIGATION.

Referred to: CHARLIE BROWN Date Referred: 12/06/2011

Date Closed:

Notification: Yes

To enter data for Program/Element/Sub Element/Sub-Sub Element Information (P/E/S/SS):

1. Select an option from the drop-down for Program. (NOTE: The user cannot select an Element until a Program is selected.)
2. Select an option from the drop-down for Element. (NOTE: The user cannot select a Sub Element until after selected an Element is selected. Not all Elements have a Sub Element.)
3. Select an option from the drop-down for Sub Element & Sub-Sub Element. (OPTIONAL) (NOTE: The user cannot select a Sub-Sub Element until after a Sub Element is selected. Not all Sub Elements have a Sub-Sub Element.)
4. Select an option from the drop-down for 10 Essential Services. Primary and Secondary. (OPTIONAL)

P/E/SS Information	
*Program	Please Select
*Element	
Sub Element	Sub-Sub Element
10 Essential Services Information	
10 Essential Services: Primary	Please Select
Secondary	Please Select
<input type="checkbox"/> Add New Comment	

Users may also add comments for R/C/P. To add a comment:

1. Select the check box for Add New Comment.
2. Comment Date/Time default to the user’s system Date and Time. Accept the default or change to an alternative.
3. Enter text for comment.
4. Click or Select the checkbox for Alert (OPTIONAL).
5. Enter an effective date range for the Alert in Alert Effective From/To. This action is optional. The user may want the Alert to remain in effect for the life of the R/C/P or may want it to be effective for a set date only.

Add Activity Master

* Indicates required field

*Activity Date Activity Due Date

*Activity Type

Duration: Hours Minutes

Comments [Spell Check](#)

(Maximum characters: 4000)
You have characters left.

Save/InProcess
Save/Finalized
Cancel

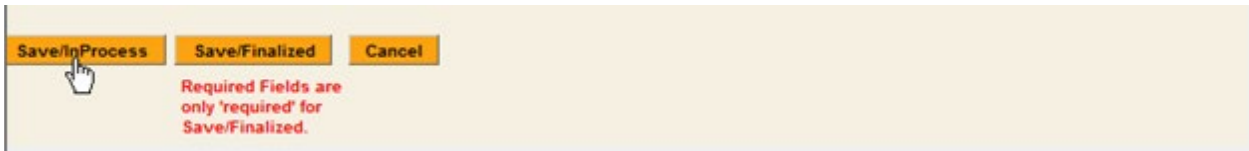
Required Fields are only 'required' for Save/Finalized.

The Activity Master panel allows the user to add new activity at the same time an RCP is added or edited.

1. To add activity, enter the Activity Date, Activity Due Date, Activity Type, and any comments.

After the complaint information is entered the user may choose to save the R/C/P as InProcess or Finalized. All required fields must be satisfied before the user can select Save/Finalized. Use the Save/Inprocess button to enter limited information and return to the R/C/P at a later time to enter all required fields.

4. Click on the Save/InProgress button or...
5. Click on the Save/Finalized button.



A new screen displays the R/C/P Show Table screen with the new R/C/P in the Show Table panel.

<input type="checkbox"/> Add New <input type="checkbox"/> Copy <input type="checkbox"/> Print Worksheet <input type="checkbox"/> Attachments											
<input type="checkbox"/> Surveys <input type="checkbox"/> Activities <input type="checkbox"/> Foodborne Illness <input type="checkbox"/> Product <input type="checkbox"/> Mortgage <input type="checkbox"/> Well <input type="checkbox"/> Wastewater <input type="checkbox"/> Lead <input type="checkbox"/> Comments <input type="checkbox"/> Audit											
<input type="checkbox"/>	R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted	
<input type="checkbox"/>	6/28/2017	Request Final	Food Product Incident			Test Request Smith, John	Open <input type="button" value="Open/Close"/>		6/28/2017 6/28/2017	Active	

NOTE: If the user intends to enter a Survey and link it to the R/C/P, the R/C/P MUST be linked to an Establishment.

10.5 ADD R/C/P FROM THE R/C/P MODULE

To add a R/C/P from the R/P/C Show Table Screen:

1. Click on the Add New button.

<input type="button" value="Add New"/> <input type="checkbox"/> Copy <input type="checkbox"/> Print Worksheet <input type="checkbox"/> Attachments											
<input type="checkbox"/> Surveys <input type="checkbox"/> Activities <input type="checkbox"/> Foodborne Illness <input type="checkbox"/> Product <input type="checkbox"/> Mortgage <input type="checkbox"/> Well <input type="checkbox"/> Wastewater <input type="checkbox"/> Lead <input type="checkbox"/> Comments <input type="checkbox"/> Audit											
<input type="checkbox"/>	R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted	
<input type="checkbox"/>											

WebEHRS displays a screen for a new R/C/P. The user may choose to link the R/C/P to an Establishment using the lookup link provided on the Add R/C/P screen.

Add R/C/P (Request/Complaint/Project) Cancel

* Indicates required field

Establishment [Lookup...](#) [Reset Establishment](#)

*Area PHOENIX Service Unit Please Select Community Please Select

Reservation Please Select Tribe Please Select

R/C/P Number

*R/C/P Date 12/9/2011 Time 2:30 PM

Received By

Request Method Please Select *Assigned EHS Gray, Violet

*R/C/P Type Please Select *Supplemental R/C/P Type Please Select *R/C/P Title

R/C/P Description

To return to the Show Table screen, click on the Cancel button.

To continue with the R/C/P, enter the R/C/P information:

1. Enter R/C/P Date.
2. Select Assigned to from dropdown.
3. Select R/C/P Type from the dropdown.
4. Select Supplemental Type.
5. Enter R/C/P Title.

Edit R/C/P (Request/Complaint/Project) Cancel

* Indicates required field

Establishment [Lookup...](#) [Reset Establishment](#)

*Area PHOENIX Service Unit COLORADO RIVER Community Please Select

Reservation COLORADO RIVER Tribe CAHUILLA BAND OF MISSION INDIANS, CA Active/Deleted Active

R/C/P Number R/C/P Status InProcess

*R/C/P Date 12/09/2011 Time 2:30 PM

Received By P Pattie

Request Method Phone *Assigned EHS Brown, Charlie

*R/C/P Type Request *Supplemental R/C/P Type Well Survey *R/C/P Title Well Survey Request

R/C/P Description Resident reported bad odor and reddish brown color in water supplied from well..

The Location Panel includes the person/premise name and address for the R/C/P.

The R/C/P Contact Information allows the user to enter contact information for the person that submits a request. First name and last name are required.

- Enter First Name by typing the name.
- Enter Last Name by typing the name.

Location	
Person/Premise	Luke Skywalker
Address 1	42009 Lake Havasu Rd
Address 2	
City	Lake Havasu
State	Arizona
ZIP Code	92363
R/C/P Contact Information (Requestor, Complainant or Project Contact)	
*First Name / Last Name	Luke Skywalker
Address 1	42009 Lake Havasu Rd
Address 2	
City	
State	Please Select
ZIP Code	
Primary Phone	(502) 695-1999
Ext.	
Type	Home
Name	Luke
Alternate Phone	() - - - -
Ext.	
Type	
Name	
Fax	() - - - -
Email	
Conditions	Primary water well for home and farm.

➤ Continue entering optional data as necessary.

Owner or Occupant Involved <input checked="" type="checkbox"/> Check here if same as location	
First Name / Last Name	
Address 1	42009 Lake Havasu Rd
Address 2	
City	Lake Havasu
State	Arizona
ZIP Code	92363
Primary Phone	() - - - -
Ext.	
Type	
Name	
Secondary Phone	() - - - -
Ext.	
Type	
Name	
Initial Action	
Init Act Taken Date	12/12/2011
Init Act Taken By	Scheduled survey.
Findings for R/C/P	
Referred to	Charlie Brown
Date Referred	12/9/2011
Date Closed	
Notification	Yes

To enter data for Program/Element/Sub Element/Sub-Sub Element Information (P/E/S/SS):

1. Select an option from the drop-down for Program. (NOTE: The user cannot select an Element until a Program is selected.)

2. Select an option from the drop-down for Element. (NOTE: The user cannot select a Sub Element until after selected an Element is selected. Not all Elements have a Sub Element.)
3. Select an option from the drop-down for Sub Element & Sub-Sub Element. (OPTIONAL) (NOTE: The user cannot select a Sub-Sub Element until after a Sub Element is selected. Not all Sub Elements have a Sub-Sub Element.)
4. Select an option from the drop-down for 10 Essential Services. Primary and Secondary. (OPTIONAL)

P/E/S/SS Information

*Program *Element

Sub Element Sub-Sub Element

10 Essential Services Information

10 Essential Services: Primary

Secondary

Add New Comment

Add Activity Master

* Indicates required field

*Activity Date Activity Due Date

*Activity Type

Duration: Hours Minutes

Comments [Spell Check](#)

(Maximum characters: 4000)
You have characters left.

Required Fields are only 'required' for Save/Finalized.

The Activity Master panel allows the user to add new activity at the same time an RCP is added or edited.

To add activity, enter the Activity Date, Activity Due Date, Activity Type, and any comments.

After the request information is entered, the user may choose to save the R/C/P as “InProgress” or “Finalized.” All required fields must be satisfied before the user can Save/Finalized. Use the Save/InProgress button to enter limited information and return to the request at a later time to enter all required fields.

6. Click on the Save/InProgress button.

Or

- Click on the Save/Finalized button.

WebEHRS displays the R/C/P screen with the request displayed in the Show Table panel.

Add New Copy Print Worksheet Attachments										
Surveys Activities Foodborne Illness Product Mortgage Well Wastewater Lead Comments Audit										
	R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted
	6/28/2017	Request Final	Food Product Incident			Test Request Smith, John	Open Open/Close		6/28/2017 6/28/2017	Active

10.6 EDIT EXISTING R/C/P

To Edit an existing R/C/P begin with a search for the desired R/C/P:

- Enter search criteria.
- Click on the Search button.

Main Menu Estabs. Temp. Estabs. Surveys R/C/P Nat'l. Proj.'s Activities Letters Ref. Lib. Reports My Account Feedback Logout										
R/C/P-Requests/Complaints/Projects										
My Filters Please Select Add/Edit My Filters Use the fields below for ad-hoc filtering. Click "Add/Edit My Filters" to save the current filtering options.										
Areas/SU's All ABERDEEN / BISMARCK ABERDEEN / CHEYENNE RIVER ABERDEEN / CROW CREEK			SU's/Communities [Empty]			Tribes All ABSENTEE-SHAWNEE TRIBE, OK AFOGNAK AGUA-CALIENTE BAND CAHULLA INDIANS, CA			Estab. Name [joe cool] containing Estab. Types All 01 Comprehensive Health Care Referral Facility 02.1 Hospital w/ Surgery w/ DEHS Funded Safety Officer 02.2 Hospital w/ Surgery and No DEHS Funded Safety Officer 02.3 Hospital w/o Surgery w/ DEHS Funded Safety Officer 02.4 Hospital w/o Surgery w/ no DEHS Funded Safety Officer 03.1 Health Center w/ DEHS Funded Safety Officer 03.2 Health Center w/ no DEHS Funded Safety Officer 04 School Health Center 05 Health Station	
Reservations All ACOMA AK-CHIN MARIKOPA ALABAMA COUSHATTA LIVINGSTON TEXAS			Address containing [] City []			Service Type All		Active/ Deleted All		Apply Areas
Additional Search Options										
R/C/P Type All			Supplemental R/C/P Type All			R/C/P Status All				
R/C/P Title containing []			R/C/P Date Range From: [] Thru: []			R/C/P Number []				
Location Person/Premise containing []			EHS All			Estab. Number []				
R/C/P Contact containing []			Open/Closed All			Search Clear				

WebEHRS displays search results in the Show Table. To edit:

- Click the edit icon.

Add New Copy Print Worksheet Attachments										
Surveys Activities Foodborne Illness Product Mortgage Well Wastewater Lead Comments Audit										
	R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted
	6/28/2017	Request Final	Food Product Incident			Test Request Smith, John	Open Open/Close		6/28/2017 6/28/2017	Active

WebEHRS displays an edit screen for the R/C/P.

Edit R/C/P (Request/Complaint/Project) Cancel

* Indicates required field

Establishment **JOE COOL'S SUMMER CAMP** [Reset Establishment](#)

*Area **PHOENIX** Service Unit **COLORADO RIVER** Community **CHEMEHUEVI VALLEY**

Reservation **CHEMEHUEVI** Tribe **CHEMEHUEVI TRIBE,CHEMEHUEVI RES, CA** Active/Deleted **Active**

R/C/P Number R/C/P Status **Finalized**

*R/C/P Date **12/08/2011** Time **1:00 PM**

Received By **Peppermit Pattie**

Request Method **Phone** *Assigned EHS **Brown, Charlie**

*R/C/P Type **Complaint** *Supplemental R/C/P Type **None** *R/C/P Title **UNSANITARY CONDITIONS JOE COOL CAMP**

R/C/P Description

The user may cancel or make and save the edits. To edit:

- Enter information using dropdowns and text boxes.

Findings for R/C/P

[Spell Check](#)

(Maximum characters: 4000)
You have characters left.

Referred to Date Referred

Date Closed

Notification

P/E/S/SS Information

*Program *Element

Sub Element Sub-Sub Element

10 Essential Services Information

10 Essential Services: Primary

Secondary

View Comments

Add New Comment

P/E/SS Information

*Program *Element

Sub Element Sub-Sub Element

10 Essential Services Information

10 Essential Services: Primary

Secondary

Add New Comment

Add Activity Master

* Indicates required field

*Activity Date Activity Due Date

*Activity Type

Duration: Hours Minutes

Comments [Spell Check](#)

(Maximum characters: 4000)
You have characters left.

Required Fields are only 'required' for Save/Finalized.

The Activity Master panel allows the user to add new activity at the same time an RCP is added or edited.

3. To add activity, enter the Activity Date, Activity Due Date, Activity Type, and any comments.

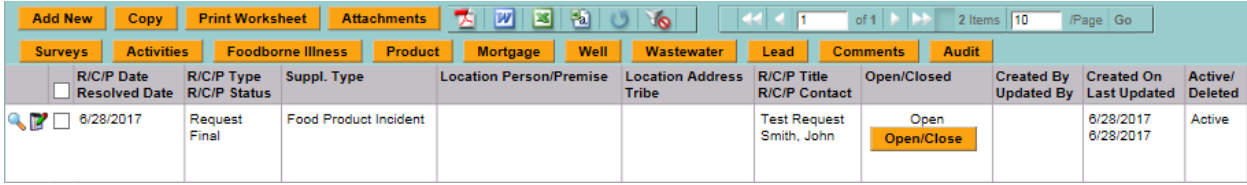
NOTE: If either of the R/C/P Type or Supplemental R/C/P Type elements are modified, WebEHRS will PERMANENTLY delete any supplementals for the R/C/P. Supplemental R/C/P information is covered later in the R/C/P Module section of this User Guide.

After all edits are complete, save the edits by:

4. Click on the Save/Finalized button.



WebEHRS displays the edited R/C/P in the Show Table panel.

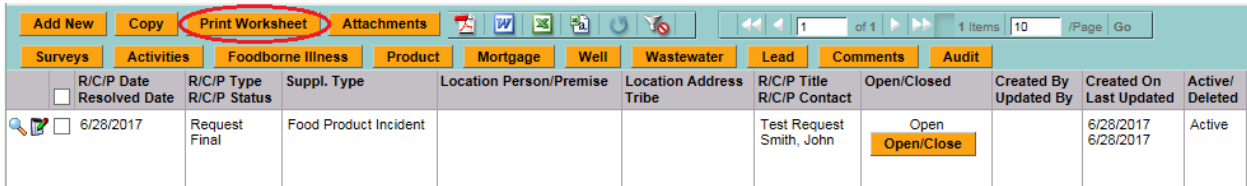


Add New Copy Print Worksheet Attachments												
Surveys Activities Foodborne Illness Product Mortgage Well Wastewater Lead Comments Audit												
	R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted		
<input type="checkbox"/>	6/28/2017	Request Final	Food Product Incident			Test Request Smith, John	Open Open/Close		6/28/2017 6/28/2017	Active		

10.7 PRINT WORKSHEET BUTTON

Printed Worksheets are helpful for field investigations/Surveys. WebEHRS allows the user to print a worksheet for an R/C/P. To print a worksheet:

1. Select the R/C/P using the check box in the Show Table panel.
2. Click on the Print Worksheet button.



Add New Copy Print Worksheet Attachments												
Surveys Activities Foodborne Illness Product Mortgage Well Wastewater Lead Comments Audit												
	R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted		
<input type="checkbox"/>	6/28/2017	Request Final	Food Product Incident			Test Request Smith, John	Open Open/Close		6/28/2017 6/28/2017	Active		

WebEHRS opens a new window in the user’s internet browser. The new window displays an image of the worksheet using the Crystal Report Viewer. Data entered for the R/C/P populates the respective fields on the Worksheet. The user may view, export, or print the Worksheet from the Crystal Report Viewer.

3. Click the pagination arrows to view additional pages within the image.
4. Modify the Zoom Percentage value to view a larger/smaller image.
5. Click the diskette icon to Export the report into a different format.
6. Click the printer icon to print the Worksheet.

Indian Health Service
REQUEST FOR SERVICE

Date/Time: 12/04/2011 1:00 pm Received By: Peppermint Paine Status: InProcess R/C/P Number: _____

Area: PHOENIX Service Unit: COLORADO RIVER Community: CHEMURHUEVI VALLEY

Reservation: CHEMURHUEVI Tribe: CHEMURHUEVI TRIBE CHEMURHUEVI RES. CA

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

Supplemental R/C/P Type: _____ R/C/P Title: UNSANITARY CONDITIONS JOE COOL CAMP

R/C/P Description: Unsanitary conditions including standing water.

Location:
Person/Premise: JOE COOL'S SUMMER CAMP
Location: 4409F LAKE HAVASU RD, LAKE HAVASU CA, 92189

R/C/P Contact Information (Requestor, Complainant or Project Contact)
Service Requested By: CONCERNED PARENT Address: _____
Primary Phone: (502) 692-1999 Email: _____
Alternate Phone: (502) 692-1999 Fax: _____
Initial Action Taken On: 12/04/2011 By: P FATTIE

Conditions: _____

Owner or Occupant Involved:
Person: _____
Location: _____
Primary Phone: _____ Alternate Phone: _____

Initial Action:
Init Act Taken Date: _____ Init Act Taken By: _____
Findings for R/C/P: ASSIGN TO FIELD STAFF TO PERFORM INVESTIGATION
Referred To: CHARLIE BROWN Date: 12/04/2011
Date Closed: _____
Notified Requester: YES _____ Charlie Brown
EHS

10.8 ATTACHMENTS BUTTON







The Attachments button allows the user to view attachments associated with a selected R/C/P. To use the Attachments button:

1. Use the checkbox to select the desired R/C/P from the Show Table panel.
2. Click the Attachments button.

<input type="checkbox"/> Add New <input type="checkbox"/> Copy <input type="checkbox"/> Print Worksheet <input checked="" type="checkbox"/> Attachments										
<input type="checkbox"/> Surveys <input type="checkbox"/> Activities <input type="checkbox"/> Foodborne Illness <input type="checkbox"/> Product <input type="checkbox"/> Mortgage <input type="checkbox"/> Well <input type="checkbox"/> Wastewater <input type="checkbox"/> Lead <input type="checkbox"/> Comments <input type="checkbox"/> Audit										
<input type="checkbox"/>	R/C/P Date	R/C/P Type	Suppl. Type	Location Person/Premise	Location Address	R/C/P Title	Open/Closed	Created By	Created On	Active/ Deleted
<input checked="" type="checkbox"/>	6/28/2017	Request Final	Food Product Incident		123 Test Street Phoenix, AZ	Test Request Smith, John	Open <input type="button" value="Open/Close"/>		6/28/2017 6/28/2017	Active

WebEHRS opens a pop-up window and displays the R/C/P Date, type, status, title/description, closed date, person/premise, address, conditions, and R/C/P # for the selected R/C/P.

R/C/P (Request/Complaint/Project)				
R/C/P Date	R/C/P Type	R/C/P Status	R/C/P Title/Description	Closed Date
6/28/2017	Request	Final	Test Request	
Person/Premise	Address	City / ST / ZIP	Conditions	R/C/P #
	123 Test Street	Phoenix Arizona		

Attachments				
Active/Deleted	ACTIVE	Search	Clear	
Upload	     	0	of 0	0 Items 10 /Page Go
File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted








To upload a new attachment:

1. Click the Upload button.
2. Use the Browse button to search for the desired file.
3. Select a Document Type from the drop-down menu.
4. Click Save and Upload.


Attachment Upload	
* Indicates required field	
Please remember that excessively large files can take a long time to load. Click the Browse button below to select your file.	
* File Name	<input type="text"/> <input type="button" value="Browse..."/>
* Document Type	Please Select <input type="button" value="v"/>
<input type="button" value="Save and Upload"/> <input type="button" value="Cancel"/>	

The new attachment displays with the file name, document type, created on/last updated dates, updated by, and active/deleted status.

R/C/P (Request/Complaint/Project)				
R/C/P Date	R/C/P Type	R/C/P Status	R/C/P Title/Description	Closed Date
6/28/2017	Request	Final	Test Request	
Person/Premise	Address	City / ST / ZIP	Conditions	R/C/P #
	123 Test Street	Phoenix Arizona		

Attachments				
Active/Deleted	ACTIVE	Search	Clear	
Upload	     	1	of 1	1 Items 10 /Page Go
File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
 Test Attachment.docx	Assessments	6/29/2017 / 6/29/2017		ACTIVE

To update or modify (replace) the attachment:

1. Click the Edit record  icon.

Update/Modify Attachment

*** Indicates required field**

This allows you to update/modify the information in this pop-up. You cannot edit the document itself, but you can replace the document. Please remember that excessively large files can take a long time to load.

Click the Browse button below to select your file.

File Name Browse...

Current File Name Test Attachment.docx

* Document Type Assessments

* Active/Deleted ACTIVE

Save and/or Upload Cancel

The document type and active/delete status can be modified, but the document itself cannot be edited; only replaced with a new document.

Click Save and/or Upload or Cancel without saving.

10.9 COPY BUTTON

WebEHRS allows a user to copy an existing R/C/P to create a R/C/P. The Copy feature can save time when a user enters an R/C/P that is similar to an existing R/C/P. To copy:

1. Use the Search Filters to locate the R/C/P to copy.
2. Use the checkbox to select the desired R/C/P from the Show Table panel.
3. Click the Copy button.

The screenshot shows a software interface with a menu bar at the top containing 'Add New', 'Copy', 'Print Worksheet', and 'Attachments'. The 'Copy' button is circled in red. Below the menu is a table with columns: R/C/P Date, R/C/P Type, Suppl. Type, Location Person/Premise, Location Address, R/C/P Title, Open/Closed, Created By, Created On, and Active/Deleted. A single row is visible with the following data: R/C/P Date: 6/28/2017, R/C/P Type: Request Final, Suppl. Type: Food Product Incident, Location Address: Test Request Smith, John, Open/Closed: Open, Created On: 6/28/2017, Active/Deleted: Active. An 'Open/Close' button is located in the 'Open/Closed' column of the row.

WebEHRS opens the add R/C/P screen; all data elements on the original R/C/P are copied into the fields on the Add screen. To continue with the newly copied R/C/P:

1. Modify any fields that are different.
2. Change the R/C/P Title.
3. Enter additional data as needed (Optional).

Add R/C/P (Request/Complaint/Project) Cancel

** Indicates required field*

Establishment [Lookup...](#) [Reset Establishment](#)

*Area PHOENIX Service Unit COLORADO RIVER Community Please Select

Reservation COLORADO RIVER Tribe CAHUILLA BAND OF MISSION INDIANS, CA

R/C/P Number

*R/C/P Date 12/11/2011 Time 2:30 PM

Received By P Pattie

Request Method Phone *Assigned EHS Pattie, Peppermint

*R/C/P Type Request *Supplemental R/C/P Type Well Survey *R/C/P Title Well Survey Request - Hann Solo

R/C/P Description
Resident reported bad odor and reddish brown color in water supplied from well.

Location

Person/Premise Hann Solo

Address 1 420012 Lake Havasu Rd

Address 2

City Lake Havasu State Arizona ZIP Code 92363

R/C/P Contact Information (Requestor, Complainant or Project Contact)

*First Name / Last Name Hann Solo

Address 1 420012 Lake Havasu Rd

Address 2

City State Please Select ZIP Code

Primary Phone (502) 695-1999 Ext. Type Home Name Luke

Alternate Phone Ext. Type Name

Fax Email

Conditions
Primary water well for home and farm.

Owner or Occupant Involved Check here if same as location

First Name / Last Name

Address 1 420012 Lake Havasu Rd

Address 2

City Lake Havasu State Arizona ZIP Code 92363

Primary Phone Ext. Type Name

Secondary Phone Ext. Type Name

Findings for R/C/P

Referred to Date Referred

Date Closed

Notification

P/E/S/SS Information

*Program *Element

Sub Element Sub-Sub Element

10 Essential Services Information

10 Essential Services: Primary

Secondary

Add New Comment

Required Fields are only 'required' for Save/Finalized.

After all information is modified/entered:

- Click Save/InProgress.

Or

- Click Save/Finalize.

WebEHRS displays the R/C/P Show Table screen with the newly copied R/C/P in the Show Table.

R/C/P Date Resolved	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted
<input type="checkbox"/> 6/28/2017	Request Final	Food Product Incident		123 Test Street Phoenix,AZ	Test Request Smith, John	Open <input type="button" value="Open/Close"/>		6/28/2017 6/29/2017	Active
<input type="checkbox"/> 6/28/2017	Request Final	Food Product Incident		456 Test Street Phoenix,AZ	Copy of Test Request Smith, John	Open <input type="button" value="Open/Close"/>		6/29/2017 6/29/2017	Active

10.10 SURVEYS BUTTON

The Survey button allows the user to view surveys associated with the selected R/C/P. To use the Survey button:

1. Select the desired R/C/P using the check box in the Show Table panel.
2. Click the Surveys Button.

R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted
6/28/2017	Request Final	Food Product Incident		123 Test Street Phoenix AZ	Test Request Smith, John	Open Open/Close		6/28/2017 6/29/2017	Active

WebEHRS displays a screen showing the Survey History for the R/C/P. The screen displays the R/C/P Title, R/C/P Number, Establishment Name & Address, Establishment Type and Next Survey Due in the R/C/P panel. Survey history (if any) is displayed in the Survey History panel. If there are no previous surveys linked to the R/C/P, no surveys will be shown.

R/C/P Title	R/C/P #	Name/Address	Establishment Type	Next Survey Due
Test		Test Facility Food Service 1234 Brown Street Rhinelander, Wisconsin 54501	22.1 Head Start	5/20/2016

Date Survey Performed	Survey Purpose	EHS Survey Status	Survey Final Date	# of Critical or P/PF Deficiencies	Estab. Name	Survey Type	Origin	Create User Update User	Setup Date Update Date	Record Status
0 Items										

Adding new surveys is addressed in the Survey Module section of this User Guide.

To return to the R/C/P screen:

3. Click on Return to R/C/P button.

10.11 ACTIVITIES BUTTON

The Activities button allows the user to view activities associated with the selected R/C/P. To use the Activities button:

1. Select the R/C/P using the check box in the Show Table panel.
2. Click the Activities button.

R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted
6/28/2017	Request Final	Food Product Incident		123 Test Street Phoenix AZ	Test Request Smith, John	Open Open/Close		6/28/2017 6/29/2017	Active

WebEHRS displays a screen with the Activities information. The screen displays the R/C/P Date, Type, Status, Title/Description, Closed Date, Person/Premise information, and Address in the R/C/P panel. All Activities that are linked to the R/C/P will appear in the Show Table panel.

Adding new Activities and other functions for activities are addressed in the Activities module section of this User Guide.

To return to the R/C/P module:

3. Click on Return to R/C/P.

10.12 ADD AND EDIT SUPPLEMENTAL INFO BUTTON

On the R/C/P Menu Icon bar, there are several buttons that allow the user to view or edit supplemental information that may be associated with a R/CP. The supplementals types are:

- Foodborne Illness,
- Product (food),
- Mortgage,
- Well,
- Wastewater,
- Lead.

These buttons allows the user to view or add supplemental information associated with the R/C/P. To use the supplemental information buttons:

1. Select the R/C/P using the check box in the Show Table panel.
2. Click on the corresponding supplemental information button.

Add New Copy Print Worksheet Attachments Well Wastewater Lead Comments Audit											
Surveys	Activities	Foodborne Illness	Product	Mortgage	Well	Wastewater	Lead	Comments	Audit		
<input type="checkbox"/>	R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted	
<input checked="" type="checkbox"/>	6/28/2017	Request Final	Food Product Incident		123 Test Street Phoenix,AZ	Test Request Smith, John	Open Open/Close		6/28/2017 6/29/2017	Active	

To edit or add supplemental information:

- Enter information.
- Click on the Save and Return button.

All supplemental information is optional.

R/C/P (Request/Complaint/Project)
Cancel

R/C/P Date	R/C/P Type	Supplemental R/C/P Type	Person/Premise	R/C/P Contact Name/Address	R/C/P#
12/9/2011	Request	Well Survey	Luke Skywalker	Luke Skywalker 42009 Lake Havasu Rd	

Edit Private Well
Print Well

Date:

Dwelling Status:

If Unoccupied, vacant for how long?

Sample Taken? Location:

Well Type: Depth: Casing Material:

Top sealed? How Sealed: Latitude: Longitude:

Well In Pit?

Well In Pit Complaint:

Well In Pit Deficiencies:

Distance Above Ground:

Pressure Tank Size: Location:

Pump Size: Location:

Property Vented? Comment if NO:

Evidence of Cross Connections? Comment if YES:

Isolation Distances Correct? Comment if NO:

Possible Routes of Contamination:

Comments:

EHS:

Date/Amt Received:

Receipt/Check #:

Name/Initials Person Rcvd Payment:

Active/Deleted:

Save
Cancel

To return to the R/C/P module without saving, click on the Cancel button.

Users may also edit R/C/P Supplemental Information. The following example is from a Foodborne Illness supplemental. Each supplemental is similar in process, but will display a little differently because of the type of information captured.

<input type="checkbox"/>	Individual Reporting Ill?	Reporting For Self?	If no, Relationship	Birth Date	Employment Phone	Place of Employment	Sex	Created By	Updated By	Created On	Last Updated	Active/Deleted
								PKothapalli	PKothapalli	12/13/2011	12/13/2011	Active
	Yes	Yes		12/7/2011				PKothapalli	VGray	12/13/2011	12/16/2011	Active

To edit a supplemental type:

- Select existing supplemental type using edit icon.

WebEHRS displays the Edit R/C/P edit screen with information about the complaint and supplemental information in the edit panel.

R/C/P (Request/Complaint/Project)					
Request Date	R/C/P Type	Supplemental R/C/P Type	Person/Premise	R/C/P Contact Name/Address	Request #
12/6/2011	Complaint	Foodborne illness	JOE COOL'S SUMMER CAMP	JOHN ADAMS MEDICAL CLINIC	345

Edit Foodborne Illness Interview Cancel

Interviewed by First/Last Name:

Individual Reporting Ill? Yes No, Relationship:

Reporting for Self? Yes No

Subject Mailing First/Last Name:

Mailing Address 1:

Mailing Address 2:

Mailing City/State/Zip: Please Select

Primary Phone: Ext. Type: Please Select Name:

Alternate Phone: Ext. Type: Please Select Name:

Subject Information

Birth Date: Sex:

Place Of Employment:

Employment Phone: Ext. Type:

Employee Position:

School/Daycare Center:

Grade:

Symptom Information

First Symptom Date/Time:

Nausea? Duration:

Vomiting? Duration:

Diarrhea? Duration:

Fever? Duration: Temp:

Abdominal Cramps? Duration:

Bodyache? Duration:

Headache? Duration:

Prostration? Duration:

Other Symptom Description: Duration:

Call or See a Physician? Diagnosis:

Physician First/Last Name:

Hospitalized?

Hospital Name: Duration:

Stool Culture Done?

Laboratory: Result:

Food Information

Food Eaten Date/Time:

Others Eating Suspected Meal

Add Row Delete Row

First/Last Name	Address/City/State/Zip	Primary Phone	Alternate Phone	Is Ill?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

72 Hour Food History

Add Row Delete Row

Food Date	Food Time	Type Of Meal	Food Location	Food item/Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save & Return Save & New Cancel

10.13 COMMENTS BUTTON

The Comments button allows the user to view, edit and add comments for an R/C/P. To use the Comments button:

1. Select the checkbox next to the desired R/C/P from the Show Table panel.
2. Click on the Comments button

Add New Copy Print Worksheet Attachments											
Surveys Activities Foodborne Illness Product Mortgage Well Wastewater Lead Comments Audit											
	R/C/P Date Resolved Date	R/C/P Type R/C/P Status	Suppl. Type	Location Person/Premise	Location Address Tribe	R/C/P Title R/C/P Contact	Open/Closed	Created By Updated By	Created On Last Updated	Active/ Deleted	
<input checked="" type="checkbox"/>	6/28/2017	Request Final	Food Product Incident		123 Test Street Phoenix,AZ	Test Request Smith, John	Open Open/Close		6/28/2017 6/29/2017	Active	

WebEHRS displays the Comments screen showing all existing comments associated with the R/C/P. The Comments Show Table Panel shows the date the comment was created, a description (if applicable), alert information (if applicable), and the created/updated information.

Comments						
Include current alerts? All Active/Deleted All Search						
Add New						
	Date	Description	Alert?	Alert Date Range	Created By Updated By	Created On Last Update
OK Click OK to close window and return to previous screen.						

To add a comment:

1. Click on the Add New button.
2. Accept the default date or change to alternative.
3. Enter text for comment.
4. Enter an Alert From and Alert To date range (OPTIONAL)
5. Select the checkbox for Alert? (OPTIONAL)

To save the new comment:

6. Click Save.

WebEHRS returns the user to the Comments Show Table Panel.

Date	Description	Alert?	Alert Date Range	Created By Updated By	Created On Last Update
12/12/2011	There is a stock yard nearby. Need to investigate to determine if this is the souce of potential gro...	No		PPattie PPattie	12/12/2011 12/12/2011

To return to the R/C/P Show Table Screen:

7. Click on the Ok button.

10.14 AUDITS BUTTON

The Audit button allows the users to view the edit history for an R/C/P. To use the Audit button:

1. Use the checkbox to select the desired R/C/P from the Show Table panel.
2. Click on the Audit button.

R/C/P Date	R/C/P Type	Suppl. Type	Location Person/Premise	Location Address	R/C/P Title	Open/Closed	Created By	Created On	Active/ Deleted
6/28/2017	Request Final	Food Product Incident		123 Test Street Phoenix, AZ	Test Request Smith, John	Open Open/Close		6/28/2017 6/29/2017	Active

WebEHRS displays the Auditing screen. The R/C/P Title and R/C/P Date is shown for reference. The audit history (change date, action performed and the name of the user that performed the action) will be shown in the panel.

3. Click the plus + icon to expand a row.

NOTE: By default only the most recent change is expanded when the screen initially displays.

In the expanded view, the screen displays the column name, and the before and after values.

Change Date	Action	User																											
12/11/2011 2:12:50 PM	UPDATE	Peppermint Pattie																											
<table border="1"> <thead> <tr> <th>Column Name</th> <th>Before Value</th> <th>After Value</th> </tr> </thead> <tbody> <tr> <td>REQUEST_DATE</td> <td>12-DEC-11</td> <td>09-DEC-11</td> </tr> <tr> <td>RCP_STATUS_ID</td> <td>1</td> <td>2</td> </tr> <tr> <td>NOTIFICATION_YN</td> <td></td> <td>Yes</td> </tr> <tr> <td>PROGRAM_CODE_ID</td> <td></td> <td>1</td> </tr> <tr> <td>ELEMENT_CODE_ID</td> <td></td> <td>11</td> </tr> <tr> <td>ELEMENT_SUBCODE_ID</td> <td></td> <td>53</td> </tr> <tr> <td>ESSENTIAL_PRIMARY_SRV_ID</td> <td></td> <td>2</td> </tr> <tr> <td>ESSENTIAL_SNDARY_SRV_ID</td> <td></td> <td>2</td> </tr> </tbody> </table>			Column Name	Before Value	After Value	REQUEST_DATE	12-DEC-11	09-DEC-11	RCP_STATUS_ID	1	2	NOTIFICATION_YN		Yes	PROGRAM_CODE_ID		1	ELEMENT_CODE_ID		11	ELEMENT_SUBCODE_ID		53	ESSENTIAL_PRIMARY_SRV_ID		2	ESSENTIAL_SNDARY_SRV_ID		2
Column Name	Before Value	After Value																											
REQUEST_DATE	12-DEC-11	09-DEC-11																											
RCP_STATUS_ID	1	2																											
NOTIFICATION_YN		Yes																											
PROGRAM_CODE_ID		1																											
ELEMENT_CODE_ID		11																											
ELEMENT_SUBCODE_ID		53																											
ESSENTIAL_PRIMARY_SRV_ID		2																											
ESSENTIAL_SNDARY_SRV_ID		2																											
12/11/2011 2:08:51 PM	UPDATE	Peppermint Pattie																											

The Auditing screen also shows the change history for Supplemental R/C/P data (If applicable).

- Click on the Tab for the Supplemental R/C/P, if available.

WebEHRS displays any changes associated with the Supplemental R/C/P. (The example below is for a Well supplemental.)

Auditing- R/C/P Record # 102		
R/C/P Demographics		Well
1 of 1 2 Items 10 /Page Go		
Change Date	Action	User
<input type="checkbox"/> 12/11/2011	UPDATE	Peppermint Pattie
Column Name	Before Value	After Value
<input type="checkbox"/> 12/11/2011	UPDATE	Peppermint Pattie

11 NATIONAL PROJECTS

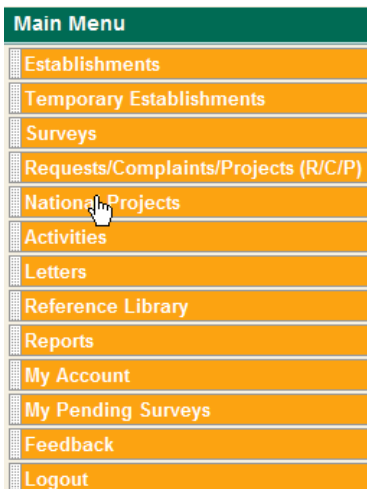
National Projects is a special sub-set of the Requests, Complaints, and Projects (R/C/P) module of WebEHRS. It has its own Main Menu button, but is based on the R/C/P format. There are two types of National Projects:

- National All. These projects are originated at the IHS Headquarters level and only a few headquarters users will have permissions to create a new National All project. (An example is a National Smoke Detector Distribution project.) IHS DEHS HQ staff will create the National All project and allow access the project by all users in the field. This allows headquarters to initiate a project and receive input from across the Areas directly into WebEHRS when users add Activities, as needed and requested.
- National Specific. These projects are also originated at the IHS DEHS HQ level only. (An example is a Solid Waste Data Call for specific users only.) IHS DEHS HQ will create the National Specific project and allow access to the project for specified users through permissions control. This allows headquarters to initiate a project and receive input from specified users directly into WebEHRS when the users add Activities, as needed and requested.

Note: All other WebEHRS users may set up their own special projects at their level using the R/C/P module.

The National Projects module can be accessed from the Main Menu or from the Main Menu Bar within other modules. To navigate to National Projects from the Main Menu:

1. Click on the National Projects button.



The Show Table Screen for National Projects includes two panels:

- The top panel includes a row of Menu Buttons. Menu buttons appear in the row depending upon the user permissions.

- Below the menu panel is the Show Table panel which provides the user with a listing of search results and additional tools.

National Projects									
Activities Add New Audit Attachments									
<input type="checkbox"/> Project (R/C/P) Title	Area	Supplemental Type	Project Contact	Project Start Date	Project Status R/C/P Status	Created By Updated By	Created On Last Updated	Open/Closed	
<input type="checkbox"/> Dental X-ray Exposure Trends	National All	Other	McMahon, David		Active InProcess	dcmcahon dcmcahon	3/2/2012 2/15/2013	Open	Close
<input type="checkbox"/> IEH Training	National All		McMahon, David		Active InProcess	dcmcahon dcmcahon	5/2/2012 2/15/2013	Open	Close
<input type="checkbox"/> IP PM Testing	National All	IP PM16-20	Smith, John	4/1/2015	Active InProcess	dbuchanan dbuchanan	4/8/2015 4/8/2015	Open	Close
<input type="checkbox"/> NAPS Project Placeholder	National Specific	Other	Buchanan, Darren	6/30/2014	Deleted Final	dbuchanan dbuchanan	6/30/2014 6/16/2015	Open	Close

The Menu panel includes buttons to view activities linked to a National Project, add a new National Project, and view the audit history of a National Project (depending on user permissions). The Activities button takes the user to the Activities (by Project) show table page for the selected Project. Users with permissions to add/edit National Projects have access to the Add New button and Edit icon directly from the National Project Show Table Page.

Note: The Show Table displays all Project records with an Area value set to "National All" and/or "National Specific" based on user permissions.

National Projects									
Activities Add New Audit Attachments									
<input type="checkbox"/> Project (R/C/P) Title	Area	Supplemental Type	Project Contact	Project Start Date	Project Status R/C/P Status	Created By Updated By	Created On Last Updated	Open/Closed	
<input type="checkbox"/> Dental X-ray Exposure Trends	National All	Other	McMahon, David		Active InProcess	dcmcahon dcmcahon	3/2/2012 2/15/2013	Open	Close
<input type="checkbox"/> IEH Training	National All		McMahon, David		Active InProcess	dcmcahon dcmcahon	5/2/2012 2/15/2013	Open	Close
<input type="checkbox"/> IP PM Testing	National All	IP PM16-20	Smith, John	4/1/2015	Active InProcess	dbuchanan dbuchanan	4/8/2015 4/8/2015	Open	Close
<input type="checkbox"/> NAPS Project Placeholder	National Specific	Other	Buchanan, Darren	6/30/2014	Deleted Final	dbuchanan dbuchanan	6/30/2014 6/16/2015	Open	Close

Each project displays on a separate row in the Show Table Panel with a button to toggle the "Open/Closed" status. Each row also has icons to access the Document Management System (DMS) and to view and edit project information.

Only the user account declared in the "Assigned EHS" or a user of greater permissions will be able to toggle the "Open/Closed" status from the National Project and/or R/C/P Show Table Screen.


11.1 VIEW/SHOW R/C/P ICONS AND LINKS

In the Show Table panel, the user can view, edit, or select the R/C/P to perform one of the functions in the Menu Icon panel.

11.1.1 VIEW NATIONAL PROJECT INFORMATION

To view information about a National Project:

1. Click on the magnifier icon for the desired National Project.

National Projects									
Project (R/C/P) Title		Area	Supplemental Type	Project Contact	Project Start Date	Project Status R/C/P Status	Created By Updated By	Created On Last Updated	Open/Closed
	<input type="checkbox"/> Dental X-ray Exposure Trends	National All	Other	McMahon, David		Active InProcess	dmcMahon dmcMahon	3/2/2012 2/15/2013	Open Close

WebEHRS opens a new screen with a summary of information for the selected project including any comments. *Note: Although WebEHRS displays National Project, the panel title reflects only that you the user is in the R/C/P module.*

View R/C/P (Request/Complaint/Project) OK			
Establishment			
Area	National All	Service Unit	Community
Reservation		Tribe	Active/Deleted Active
R/C/P Number		R/C/P Status	Finalized
R/C/P Date	12/19/2011	Time	9:00 AM
Received By	P Pattie		
Request Method	Letter	Assigned EHS	Pattie, Peppermint
R/C/P Type	Project	Supplemental R/C/P Type	Not Applicable R/C/P Title Smoke Detector Distribution
R/C/P Description	Project to Distribute Smoke Detectors for any home or establishment that serves as community center ...		
Location			
Person/Premise			
Address 1			
Address 2			
City		State	ZIP Code
R/C/P Contact Information (Requestor, Complainant or Project Contact)			
First Name	Peppermint	Last Name	Pattie
Address 1			
Address 2			
City		State	ZIP Code
Primary Phone	(502) 555-1234 Ext.	Type	Name
Alternate Phone	Ext.	Type	Name
Fax		Email	
Conditions			
Owner or Occupant Involved			
First Name		Last Name	
Address 1			
Address 2			
City		State	ZIP Code
Primary Phone	Ext.	Type	Name
Alternate Phone	Ext.	Type	Name
Project Info			
Project Start Date	12/19/2011	End Date	3/1/2012
Initial Action			
Initial Action Taken On	12/9/2011	Taken By	P Pattie
Findings for R/C/P			
Referred to		Date Referred	
Date Closed			
Notification			
P/E/S/SS Information			
Program	Injury Prevention	Element	Home / Fire Safety
Sub Element		Sub-Sub Element	
10 Essential Services Information			
10 Essential Services: Primary Inform, Educate, Empower			
Secondary			
Created By	PPattie	Updated By	PPattie
Created On	12/19/2011	Last Updated	12/19/2011
Comment			



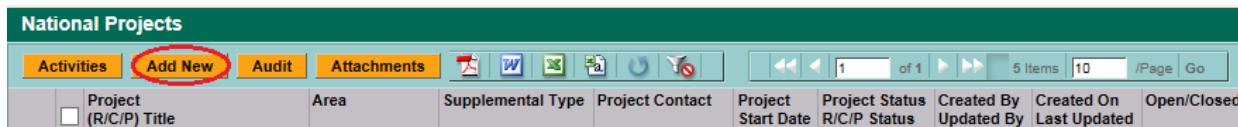
- Click on the OK button to close the view screen and return to the National Projects Show Table.

<input type="checkbox"/>	Project (R/C/P) Title	Area	Supplemental Type	Project Contact	Project Start Date	Project Status R/C/P Status	Created By Updated By	Created On Last Updated	Open/Closed
	<input type="checkbox"/> Dental X-ray Exposure Trends	National All	Other	McMahon, David		Active InProcess	dcmcahon dcmcahon	3/2/2012 2/15/2013	Open <input type="button" value="Close"/>

11.2 ADD NEW NATIONAL PROJECT

To create a new National Project:

- Click on the Add New button.
Note: Not all users will see the Add New button for National Projects. If a user does not have this permission, a new National Project will not appear in the Menu panel.



WebEHRS opens the Add R/C/P screen. The screen for Add R/C/P has multiple panels including the following:

- Add R/C/P (Request/Complaint/Project),
- Location,
- R/C/P Contact Information,
- Owner or Occupant Involved,
- Project Information if R/C/P Type selected is Project,
- Initial Action,
- Findings for R/C/P,
- P/E/S/SS,
- 10 Essential Elements,
- Comments.

To continue with the National Project, complete all required fields:

- Select Area (National All or National Specific.) using the dropdown list.
- Enter an R/C/P Date.
- Select the Assigned EHS using the dropdown list (defaults to the EHS selection for the user who is creating the new record).
- Select R/C/P Type and Supplemental R/C/P Type using the dropdown list.
- Enter an R/C/P Title.

Add R/C/P (Request/Complaint/Project) Cancel

** Indicates required field*

Establishment [Lookup...](#) [Reset Establishment](#)

*Area: National All Service Unit Community

Reservation Tribe: Please Select Active/Deleted: Active

R/C/P Number: R/C/P Status: Finalized

*R/C/P Date: 12/19/2011 Time: 9:00 AM

Received By: P Pattie

Request Method: Letter *Assigned EHS: Pattie, Peppermint

*R/C/P Type: Project *Supplemental R/C/P Type: Not Applicable *R/C/P Title: Smoke Detector Distribution

R/C/P Description: Project to Distribute Smoke Detectors for any home or establishment that serves as community center for children or adults as long as supplies last.

To continue with the new National Project, complete other required information:

6. Enter an R/C/P Contact First Name and Last Name.
7. Enter a Project Start Date.
8. Select a Program using the dropdown list.
9. Select an Element using the dropdown list.

R/C/P Contact Information (Requestor, Complainant or Project Contact)

*First Name / Last Name: Peppermint Pattie

Address 1

Address 2

City State: Please Select ZIP Code

Primary Phone: (502) 555-1234 Ext. Type Name

Alternate Phone: Ext. Type Name

Fax Email

Conditions

Owner or Occupant Involved Check here if same as location

First Name / Last Name

Address 1

Address 2

City State: Please Select ZIP Code

Primary Phone: Ext. Type Name

Secondary Phone: Ext. Type Name

Project Info

*Project Start Date: 12/19/2011 End Date: 03/01/2012

Initial Action

Init Act Taken Date: 12/09/2011 Init Act Taken By: P Pattie

Findings for R/C/P

Referred to
Date Referred

Date Closed
Notification

P/E/S/SS Information

*Program
*Element

Sub Element
Sub-Sub Element

10 Essential Services Information

10 Essential Services: Primary

Secondary

Add New Comment

Save/InProcess
Save/Finalized
Cancel

Required Fields are only 'required' for Save/Finalized.

After the information is entered the user may choose to save the National Project as “Inprocess” or “Finalized”. All required fields must be completed before the user can Save/Finalized. Use the Save/Inprocess button to enter limited information and return to the National Project at a later time to enter all required fields.

8. Click on the Save/Inprocess button or the Save/Finalized button.

WebEHRS displays the National Projects Show Table Screen with the newly added National Project displayed in the Show Table.

11.3 ACTIVITIES BUTTON

The Activities button allows the user to view activities linked to the National Project. To use the Activities button:

1. Use the checkbox to select the desired National Project from the Show Table panel.
2. Click on the Activities button.

Project (R/C/P) Title	Area	Supplemental Type	Project Contact	Project Start Date	Project Status R/C/P Status	Created By Updated By	Created On Last Updated	Open/Closed
<input checked="" type="checkbox"/> Dental X-ray Exposure Trends	National All	Other	McMahon, David		Active InProcess	dcmahon dcmahon	3/2/2012 2/15/2013	Open Close

WebEHRS displays a screen from the Activities Module. The screen displays the Date, Type, Address, Description, Closed Date, Person/Premise information, and Address in the R/C/P panel. All Activities that are linked to the National Project appear in the Show Table panel.

R/C/P (Request/Complaint/Project) Return to R/C/P

R/C/P Date	R/C/P Type	R/C/P Status	R/C/P Title/Description	Closed Date
12/19/2011	Project	Finalized	Smoke Detector Distribution	
Person/Permise	Address	City / ST / ZIP	Conditions	R/C/P #

Activity

Activity Date	Activity Type	Element	10 Essential	Comments	EHS	Created By	Created On	Active/
Activity Status	Program	Sub-Element	Primary Secondary			Updated By	Last Updated	Deleted

Adding new Activities and other functions for activities are addressed in the Activities module section of this User Guide.

To return to the National Project:

3. Click on the National Projects Menu button.

Note: Return to R/C/P in the R/C/P panel direct to user to the R/P/C Show Table Screen NOT National Projects.

11.4 ATTACHMENTS BUTTON

The Attachments button allows the user to view attachments associated with a selected National Project. To use the Attachments button:

1. Use the checkbox to select the desired National Project from the Show Table panel.
2. Click the Attachments button.

National Projects									
Activities Add New Audit Attachments									
Project (R/C/P) Title	Area	Supplemental Type	Project Contact	Project Start Date	Project Status R/C/P Status	Created By Updated By	Created On Last Updated	Open/Closed	
<input checked="" type="checkbox"/> Dental X-ray Exposure Trends	National All	Other	McMahon, David		Active InProcess	dmcMahon dmcMahon	3/2/2012 2/15/2013	<input type="button" value="Open"/> <input type="button" value="Close"/>	

WebEHRS opens a pop-up window and displays the R/C/P Date, type, status, title/description, closed date, person/premise, address, conditions, and R/C/P # for the selected National Project.

National Project				
R/C/P Date	R/C/P Type	R/C/P Status	R/C/P Title/Description	Closed Date
	Project	InProcess	Dental X-ray Exposure Trends	
Person/Premise	Address	City / ST / ZIP	Conditions	R/C/P #

Attachments				
Active/Deleted	ACTIVE	<input type="button" value="Search"/>	<input type="button" value="Clear"/>	
<input type="button" value="Upload"/>				0 Items 10 /Page Go
File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted

To upload a new attachment:

1. Click the Upload button.
2. Use the Browse button to search for the desired file.
3. Select a Document Type from the drop-down menu.
4. Click Save and Upload.

Attachment Upload	
* Indicates required field	
Please remember that excessively large files can take a long time to load. Click the Browse button below to select your file.	
* File Name	<input type="text"/> <input type="button" value="Browse..."/>
* Document Type	<input type="text" value="Please Select"/> <input type="button" value="v"/>
<input type="button" value="Save and Upload"/> <input type="button" value="Cancel"/>	

The new attachment displays with the file name, document type, created on/last updated dates, updated by, and active/deleted status.

National Project

R/C/P Date	R/C/P Type	R/C/P Status	R/C/P Title/Description	Closed Date
	Project	InProcess	Dental X-ray Exposure Trends	
Person/Premise	Address	City / ST / ZIP	Conditions	R/C/P #

Attachments

Active/Deleted: ACTIVE Search Clear

Upload 1 of 1 1 Items 10 /Page Go

	File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
	Test Attachment.docx	Assessments	6/29/2017 / 6/29/2017		ACTIVE

To update or modify (replace) the attachment:

1. Click the Edit record icon.

Update/Modify Attachment

*** Indicates required field**

This allows you to update/modify the information in this pop-up. You cannot edit the document itself, but you can replace the document. Please remember that excessively large files can take a long time to load.

Click the Browse button below to select your file.

File Name Browse...

Current File Name Test Attachment.docx

* Document Type Assessments ▼

* Active/Deleted ACTIVE ▼

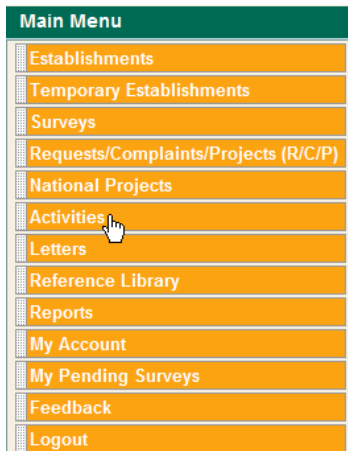
Save and/or Upload Cancel

The document type and active/delete status can be modified, but the document itself cannot be edited; only replaced with a new document.

Click Save and/or Upload or Cancel without saving.

12 ACTIVITIES

The Activities module allows the user to search, view, edit, add, and manage activities. The Activities module can be accessed from the Main Menu or from the Main Menu Bar within other modules. To navigate to Activities from the Main Menu.



The Activities Show Table screen includes multiple panels:

- The top panel is the My Filters and basic search options.
- The second panel is Additional Search Options, Search to execute a search, or Clear to clear the search criteria and search results.
- A row of Menu Buttons separates the Search Filters sections from the search results. Menu Buttons appear in the panel depending upon user permissions.
- The Show Table panel provides the user with a listing of Activities the user has permissions to view that meet the search parameters in the top and middle section of the page.

The screenshot displays the 'Activities' interface. At the top is a navigation bar with tabs for Main Menu, Estabs., Temp. Estabs., Surveys, R/C/P, Nat'l Proj's, Activities (selected), Letters, Ref. Lib., Reports, My Account, Feedback, and Logout. Below this is the 'Activities' section with various filters and search options.

My Filters: Phoenix Area (dropdown), Add/Edit My Filters (button). A red note says: "Use the fields below for ad-hoc filtering. Click 'Add/Edit My Filters' to save the current filtering options."

Areas/SU's: All, ALASKA / ANCHORAGE, ALASKA / ANNETTE ISLAND, ALASKA / BARROW. Apply Areas (button).

Reservations: All, ACOMA, AKCHIN MARICOPA, ALABAMA COUSHATTA LIVINGSTON TEXAS.

Address: containing [text] City [text].

Service Type: All (dropdown). **Active/Deleted:** Active (dropdown).

Additional Search Options: Activity Type: All, Activity Status: All, EHS: All, Program: All, Element: [dropdown], Sub Element: [dropdown], Sub-Sub Element: [dropdown], Activity Date From: [date] Thru: [date], Establishment #: [text].

10 Essential Services: Primary: All, Secondary: All. Search (button), Clear (button).

Table: 32483 items, 10 / Page Go. Columns: Activity Date, Activity Status, Activity Due Date, Activity Type, Program, Element Sub-Element, 10 Essential Primary Secondary, Establishment Estab. Type Tribe, R/C/P Title EHS, Comments, Created By Updated By, Created On Last Updated, Active/ Deleted.

Activity Date	Activity Status	Activity Due Date	Activity Type	Program	Element Sub-Element	10 Essential Primary Secondary	Establishment Estab. Type Tribe	R/C/P Title EHS	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
6/7/2017	Finalized	6/30/2017	Survey	Environmental Health	Food Protection		Sun Valley 55 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND. AZ	Show Survey			6/9/2017 6/9/2017	Active
1/27/2017			Tribes/County	Communicable Disease Control			U.S. GENERAL		The U.S. Established County	AMERICAN	1/27/2017	Active

12.1 SEARCH ACTIVITIES

The Activities Module allows the user to search for one or more Activities. WebEHRS provides extensive options for performing searches to include name, location, type, status, etc.

12.1.1 SEARCH BY AREA

To search by Area:

1. Select My Filters or Areas/SU's using the dropdowns in the search panel.
2. Click on the Search button.

The screenshot shows the 'Activities' search panel. It includes several dropdown menus for filtering: 'My Filters' (set to 'MY PHOENIX'), 'Areas/SU's' (with options like PHOENIX / COLORADO RIVER, PHOENIX / DUCK VALLEY, PHOENIX / ELKO), 'Reservations' (with options like ACOMA, AK-CHIN MARICOPA, ALABAMA COUSHATTA LIVINGSTON TEXAS), 'SU's/Communities' (with options like COLORADO RIVER / MOHAVE VALLE, COLORADO RIVER / LAUGHLIN, COLORADO RIVER / CHLORIDE), and 'Tribes' (with options like ARSENTEE-SHAWNEE TRIBE, OK, AFOGNAK, AGUA-CALIENTE BAND CAHUILLA INDIANS, CA). There are also fields for 'Address containing', 'City', 'Service Type', and 'Active/Deleted'. A red note says: 'Use the fields below for ad-hoc filtering. Click "Add/Edit My Filters" to save the current filtering options.' Below these are 'Additional Search Options' including 'Activity Type', 'Activity Status', 'EHS', 'Program', 'Element', 'Sub Element', 'Sub-Sub Element', 'Activity Date From' and 'Thru', 'Establishment #', and '10 Essential Services: Primary' and 'Secondary'. 'Search' and 'Clear' buttons are at the bottom right.

WebEHRS performs the search based on the selected area and displays the results in the Show Table.

Activity Date	Activity Status	Activity Type	Element	10 Essential	Establishment	RIC/P Title	Comments	Created By	Created On	Active/
Activity Due Date		Program	Sub-Element	Primary	Estab. Type	EHS		Updated By	Last Updated	Deleted
6/7/2017	Finalized	Survey	Food Protection	Secondary	Sun Valley 58 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND, AZ	Survey			6/9/2017	Active

If the activity is linked to an establishment or a request/complaint/project, a link is provided in the Show Table.

- Click on the link.

WebEHRS displays the establishment or R/C/P in the Establishment or R/C/P Show Table modules. Note: User will leave the Activities module if the user clicks on these links and will need to select Activities from the Main Menu bar if you want to return to that module.)

12.1.2 ADDITIONAL SEARCH OPTIONS

The user may also perform searches using the Additional Search Options:

1. Click the Clear button to reset the Search Filters.
2. Enter or select the search criteria in the fields under Additional Search Options.
3. Click on Search.

Additional Search Options

Activity Type: All | Activity Status: All | EHS: All

Program: All | Element: |

Sub Element: | Sub-Sub Element: |

Activity Date From: 07/01/2011 Thru: 12/15/2011 | Establishment #: |

10 Essential Services: Primary: All | Secondary: All | **Search** **Clear**

WebEHRS performs the search based on the selected criteria and displays the results in the Show Table.

Activity Date Activity Status Activity Due Date	Activity Type Program	Element Sub-Element	10 Essential Primary Secondary	Establishment Estab. Type Tribe	R/C/P Title EHS	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
6/7/2017 Finalized 6/30/2017	Survey Environmental Health	Food Protection		Sun Valley 58 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND, AZ	Show Survey			6/9/2017 6/9/2017	Active

12.2 VIEW/SHOW ACTIVITIES

From the Show Table, the user can view, edit or select the Activity to perform one of the functions in the Icon Menu.

Activity Date Activity Status Activity Due Date	Activity Type Program	Element Sub-Element	10 Essential Primary Secondary	Establishment Estab. Type Tribe	R/C/P Title EHS	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
6/7/2017 Finalized 6/30/2017	Survey Environmental Health	Food Protection		Sun Valley 58 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND, AZ	Show Survey		JGrady JGrady	6/9/2017 6/9/2017	Active

12.2.1 VIEW ACTIVITY

After a search is executed, the user may also view any of the returned records. To view an Activity:

1. Click on the magnifier icon for the desired Activity.

Activity Date Activity Status Activity Due Date	Activity Type Program	Element Sub-Element	10 Essential Primary Secondary	Establishment Estab. Type Tribe	R/C/P Title EHS	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
6/7/2017 Finalized 6/30/2017	Survey Environmental Health	Food Protection		Sun Valley 58 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND, AZ	Show Survey			6/9/2017 6/9/2017	Active

WebEHRS opens a new screen with a summary of information for the selected activity.

View Activity
OK

EHS	Kapusinski, Brian	Activity Date	12/9/2011	Active/Deleted	Active
Establishment	JOE COOL'S SUMMER CAMP	Activity Status	Finalized		
R/C/P Title					
Area	PHOENIX SU COLORADO RIVER	Community	CHEMEHUEVI VALLEY	Tribe	CHEMEHUEVI TRIBE,CHEMEHUEVI RES, CA
Activity Type	Survey				
Program	Environmental Health				
Element	Communicable Disease Control	Sub Element	Foodborne Illness / Disease	Sub-Sub Element	Chemical
		10 Essential Services: Primary Evaluate		Secondary Link to/Provide Care	
Duration: Hours	0	Minutes	0		
Created By	BKapusinski	Updated By	BKapusinski		
Created On	12/9/2011	Last Updated	12/9/2011		
Comments					

Element Data Indicators

Element	Communicable Disease Control
Data Indicator Name	Value

OK

To return to the Activity main screen:

- Click on the OK button.

12.2.2 EDIT ACTIVITY

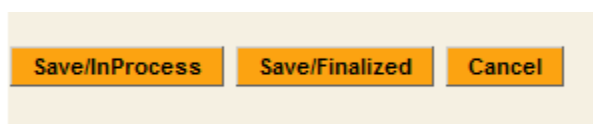
Existing Activities can be edited. To edit an Activity:

1. Click on the Edit icon for the desired Activity.

	Activity Date Activity Status Activity Due Date	Activity Type Program	Element Sub-Element	10 Essential Primary Secondary	Establishment Estab. Type Tribe	R/C/P Title EHS	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
	6/7/2017 Finalized 6/30/2017	Survey Environmental Health	Food Protection		Sun Valley 58 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND, AZ	Show Survey			6/9/2017 6/9/2017	Active

WebEHRS opens the edit screen for the activity.

2. Make changes or enter additional information by adding/editing text values, using the dropdown list boxes and/or the Lookup/Reset links.



After edits are complete:

- Click on the Save/InProgress button,
- Or Click on the Save/Finalized button.

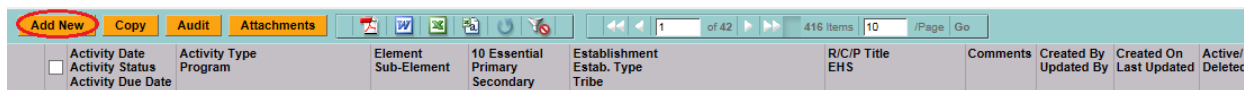
To return without saving changes:

- Click on the Cancel button.

12.3 ADD ACTIVITY

To add an Activity:

1. Click on the Add New button.



12.3.1 BASE ACTIVITY

WebEHRS displays the Add Activity screen. Required fields are indicated with a small, red Asterisk (*) and must be filled in/completed before the Activity can be Save/Finalized. (All mandatory information does not have to be completed to save an Activity as Save/InProgress.) To continue entering the new Activity:

- EHS will default to the user logged into WebEHRS. Modify using the dropdown (if necessary).
- Enter an Activity Date.

- Click the Establishment hyperlink to search for an Establishment to link to this Activity (OPTIONAL). Use the Establishment Large List Selector (LLS) screen to search for and select the desired Establishment.

Note: If an Establishment is linked to the Activity, WebEHRS will prefill the Area, Service Unit, Community, and Tribe fields from the Establishment. The fields will not be editable.

- Click the R/C/P Title hyperlink to search for an R/C/P to link to this Activity (OPTIONAL). Use the R/C/P Large List Selector screen to search for and select the desired R/C/P.
- Select Area, Service Unit, Community and Tribe from the dropdowns (Optional).
- Select Activity Type from the dropdown.
- Select Program from the dropdown.
- Select Element from the dropdown.
- Select Sub Element and Sub-Sub Element from the dropdowns (OPTIONAL).
- Select Activity Duration Hours and Minutes from the dropdowns (OPTIONAL).
- Select 10 Essential Services from the dropdowns (OPTIONAL).
- Enter Comments (OPTIONAL).

The screenshot shows the 'Add Activity' form with the following details:

- EHS:** Gray, Violet
- Activity Date:** 12/15/2011
- Establishment:** Gray, Violet
- R/C/P Title:** (Empty)
- Area:** PHOENIX
- Service Unit:** Please Select
- Community:** (Empty)
- Tribe:** AK CHIN INDIAN COMM. PAPAGO IND, AZ
- Activity Type:** Training Provided
- Program:** Injury Prevention
- Element:** ATV / Bicycle Safety
- Sub Element:** Please Select
- Sub-Sub Element:** (Empty)
- 10 Essential Services: Primary:** Inform, Educate, Empower
- Secondary:** Assure competent Workforce
- Duration:** Hours and Minutes dropdowns.
- Comments:** Text area with a 4000 character limit. Current count: 4000 characters left.

12.3.2 ELEMENT DATA INDICATORS

When the Element is selected from the dropdown, if the element has data indicators available, the Add Activity screen will refresh to show the Element Data Indicators panel.

- Enter Element Data Indicators by entering text or using the dropdowns (OPTIONAL).

Element Data Indicators	
Element ATV / Bicycle Safety	
Data Indicator Name	Value
Injury Problem	<input type="text"/>
Complaint	<input type="text"/> ▼
Physician / PCP Referral	<input type="text"/> ▼
Health Impact - Number of Injuries	<input type="text"/>
Health Impact - Rate of Injuries	<input type="text"/>
Intervention	Accident prevention.
Devices Installed or Distributed	<input type="text"/>
Number of Devices Installed or Distributed	<input type="text"/>
Cost to Repair / Install	<input type="text"/>
Cost Savings due to Service or Activity	<input type="text"/>
Sport Engaged In (specific type of activity)	<input type="text"/>
Policy or Ordinance in Place	<input type="text"/> ▼
Individuals Trained	10 <input type="text"/>
Name of Project / Study	<input type="text"/>
Partners	<input type="text"/>
Cost of Study	<input type="text"/>
Funding Agency or Entity	<input type="text"/>

Note: If the activity is involved and will take some time to complete, the user should Save/InProgress at the bottom of the screen to avoid loss of information.

Once all information is entered for the Activity:

- Click on the Save/Inprocess button,
- Or Click on the Save/Finalized button.

To return to the Activity main screen without saving the new Activity:

- Click on the Cancel button.

Save/InProgress	Save/Finalized	Cancel
-----------------	----------------	--------

12.3.3 TRAINING INFORMATION

If the Activity Type dropdown is set to Training Received or Training Provided, the Add Activity screen will display a Training Information panel. Required fields are indicated with a small Asterisk (*) and must be completed before the Activity can be Save/Finalized. To continue entering the new Activity with Training Information:

1. Enter the Instructor Name (First and Last).
2. Enter the Title of Training.
3. Select a Certification Type using the dropdown.
4. Select Yes or No using the Expiration Date Y/N? dropdown (Optional).

Note: The Expiration Date field is conditionally required if the Expiration Date Y/N dropdown is set to Yes.

5. Complete all remaining fields as necessary (OPTIONAL).

Note: Certificate Printing is not available for Training Received.

12.3.4 ATTENDEES

If the Activity Type dropdown is set to Training Provided, the Add Activity screen will display the Attendees panel and options to print certificates. To continue entering the new Activity with Attendees:

1. Enter text for First Name and Last Name,
2. Select a Tribe for each Attendee using the dropdown (OPTIONAL),

Note: There are more Tribe values than what can be displayed in the dropdown for selection. If the desired Tribe does not appear in the dropdown, click on the icon to the right-hand side of the Tribe dropdown. This will open a pop-up window to search and select from all Tribes.

3. Select Pass or Fail using the Pass/Fail dropdown.

Note: WebEHRS defaults all Attendees to Pass.

Note: The Attendees panel shows 10 blank rows by default. To add more rows for Attendees:

4. Click on the Add Single Row button to add one blank row at a time.
5. Click on the Add 10 Rows button to add ten blank rows at a time.

Select All	Print?	Firstname	Lastname	Tribe	Pass/Fail
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	John	Couger	ALATNA VILLAGE, AK	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EmmyLou	Harris	AK CHIN INDIAN COMM. PAPAGO IND, AZ	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pete	Townsend	AGUA-CALENTE BAND CAHUILLA INDIANS, CA	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jimmy	Page	ALABAMA AND COUSHATTA TRIBES, TX	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Janis	Joplin	BLACKFEET TRIBE, MT	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	George	Thorogood	AFOGNAK	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mies	Davos	ARAPAHOE TRIBE,WIND RIVER RES, WY	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Patti	Smith	BLACKFEET TRIBE, MT	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bruce	Springsten	TIGARA CORPORATION (POINT HOPE)	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Randy	Rhoads	CADDO TRIBE INDIAN, OK	Pass
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Charlie	Brown	NON-INDIAN (AND NON-FED RECOGNIZED INDIAN)	Pass

After all Attendees are entered, the user is ready to print certificates. To continue with certificate printing:

- Select the attendees, who should receive a certificate, using the check boxes in the Print? column.
Note: Select all attendees at once by using the checkbox in the Print? column header row.
- Click on the radio button for Letter Size or Business Card to select the type of Certificate.
- Click on the Save/Inprocess/Print button.
- Or click on the Save/Finalized/Print button.



WebEHRS saves the Activity and returns the user to the Activity Show Table with the activity listed in the table. WebEHRS also opens a new window in the Crystal Report Viewer showing the Certificates image.

- Click on the printer icon in the upper left-hand corner of the Crystal Report Viewer screen.

Note: If there are multiple certificates, use the arrows on the top of the report window to view the desired certificate.



12.4 COPY ACTIVITY

WebEHRS allows a user to create a new Activity using the Copy feature. This saves valuable time in creating a new Activity when it is similar to an existing Activity. To copy an Activity:

1. Use the Search Filters to locate the activity to copy.
2. Select the activity using the check box in the Show Table panel.
3. Click on the Copy button.

Activity Date Activity Status Activity Due Date	Activity Type Program	Element Sub-Element	10 Essential Primary Secondary	Establishment Estab. Type Tribe	R/C/P Title EHS	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
6/7/2017 Finalized 6/30/2017	Survey Environmental Health	Food Protection		Sun Valley 58 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND, AZ				6/9/2017 6/9/2017	Active

WebEHRS opens the Add Activity screen; all data elements on the original Activity are copied into the fields on the Add screen. To continue with the newly copied Activity:

4. Modify any fields that are different.
5. Click on the Save/Inprocess button
6. Or Click on the Save/Finalized button,

To return to the Activity main screen without saving the newly copied Activity:

7. Click on the Cancel button.

Add Activity Cancel

* Indicates required field

*EHS: *Activity Date:

[Establishment](#) [Reset Establishment](#)

[R/C/P Title](#) [Reset R/C/P](#)

*Area: Service Unit: Community: Tribe:

*Activity Type:

*Program:

*Element: Sub Element: Sub-Sub Element:

10 Essential Services: Primary: Secondary:

Duration: Hours: Minutes:

Comments:

(Maximum characters: 4000)
You have 3882 characters left.

12.5 AUDIT ACTIVITY

The Audit button allows the user to view the edit history for an Activity. To use the Audit button:

1. Select the activity using the check box in the Show Table panel.
2. Click on the Audit button.

Activity Date Activity Status Activity Due Date	Activity Type Program	Element Sub-Element	10 Essential Primary Secondary	Establishment Estab. Type Tribe	R/C/P Title EHS	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
6/7/2017 Finalized 6/30/2017	Survey Environmental Health	Food Protection		Sun Valley 58 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND, AZ				6/9/2017 6/9/2017	Active

WebEHRS displays the Auditing screen. The Activity Date and Activity Type will be shown for reference. The audit history (change date, action performed and the name of the user that performed the action) will be shown in the panel.

3. Click the plus + icon to expand a row.

NOTE: By default only the most recent change is expanded when the screen initially loads.

In the expanded view, the screen displays the column name, and the before and after values.

Auditing - Activity Record # 1236

Activity Demographics | **Activity Attendees**

Activity Date 12/15/2011 Activity Type Training Provided

8 Items 10 /Page Go

Change Date	Action	User
<input type="checkbox"/> 12/16/2011 9:56:54 AM	UPDATE	Violet Gray

Column Name	Before Value	After Value
CERTIFICATE_TEXT	<P>This certifies completion of an ATV/Bicycle Safety training ...	<P align="center">This certifies completion of an ATV...

<input type="checkbox"/> 12/16/2011 9:51:17 AM	UPDATE	Violet Gray
<input type="checkbox"/> 12/16/2011 9:29:35 AM	UPDATE	Violet Gray
<input type="checkbox"/> 12/15/2011 4:47:20 PM	UPDATE	Violet Gray
<input type="checkbox"/> 12/15/2011 4:40:34 PM	UPDATE	Violet Gray
<input type="checkbox"/> 12/15/2011 4:38:17 PM	UPDATE	Violet Gray
<input type="checkbox"/> 12/15/2011 4:35:56 PM	UPDATE	Violet Gray
<input type="checkbox"/> 12/15/2011 4:10:38 PM	UPDATE	Violet Gray

12.6 ATTACHMENTS BUTTON

The Attachments button allows the user to view attachments associated with a selected Activity. To use the Attachments button:

1. Use the checkbox to select the desired Activity from the Show Table panel.
2. Click the Attachments button.

Add New Copy Audit **Attachments**

1 of 42 416 Items 10 /Page Go

Activity Date	Activity Status	Activity Type	Program	Element	Sub-Element	10 Essential	Primary	Secondary	Establishment	Estab. Type	R/C/P Title	Comments	Created By	Created On	Updated By	Last Updated	Active/ Deleted	
<input checked="" type="checkbox"/>	6/7/2017 Finalized 6/30/2017	Survey	Environmental Health	Food Protection					Sun Valley 58 Celebration/Fair AK CHIN INDIAN COMM. PAPAGO IND. AZ		Show Survey						6/9/2017 6/9/2017	Active

WebEHRS opens a pop-up window and displays activity date, program, establishment, R/C/P title, activity type, and establishment type for the selected activity.

Activity

Activity Date	Program	Establishment	R/C/P Title
6/7/2017	Environmental Health	Sun Valley	
Activity Type	Estab. Type		
Survey	58 Celebration/Fair		

Attachments

Active/Deleted: **ACTIVE** Search Clear

Upload 0 of 0 0 Items 10 /Page Go

File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
-----------	---------------	----------------------------	------------	----------------

To upload a new attachment:

1. Click the Upload button.
2. Use the Browse button to search for the desired file.
3. Select a Document Type from the drop-down menu.
4. Click Save and Upload.

Attachment Upload

* Indicates required field

Please remember that excessively large files can take a long time to load. Click the Browse button below to select your file.

* File Name Browse...

* Document Type ▾

Save and Upload Cancel

The new attachment displays with the file name, document type, created on/last updated dates, updated by, and active/deleted status.

Activity

Activity Date	Program	Establishment	R/C/P Title
6/7/2017	Environmental Health	Sun Valley	
Activity Type	Estab. Type		
Survey	58 Celebration/Fair		

Attachments

Active/Deleted: **ACTIVE** Search Clear

Upload 1 of 1 1 Items 10 /Page Go

File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
Test Attachment.docx	Assessments	6/29/2017 / 6/29/2017		ACTIVE

To update or modify (replace) the attachment:

1. Click the Edit record  icon.

Update/Modify Attachment

*** Indicates required field**

This allows you to update/modify the information in this pop-up. You cannot edit the document itself, but you can replace the document. Please remember that excessively large files can take a long time to load.

Click the Browse button below to select your file.

File Name

Current File Name Test Attachment.docx

* Document Type

* Active/Deleted

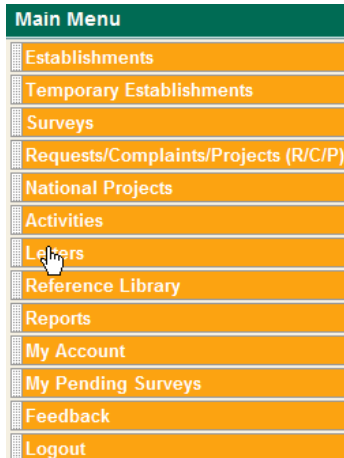
The document type and active/delete status can be modified, but the document itself cannot be edited; only replaced with a new document.

Click Save and/or Upload or Cancel without saving.

13 LETTERS

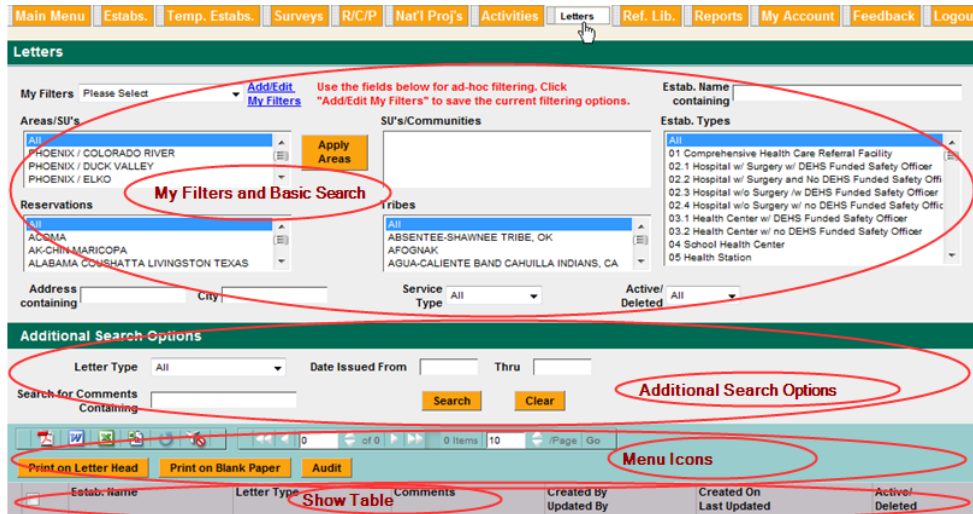
The Letters module allows the user to search, edit, and print letters associated with establishments. The Letters module is designed to generate common letters from a Letter Template. The Letters Module can be accessed from the Main Menu or from the Main Menu Bar within other modules. To navigate to Letters from the Main Menu:

1. Click on the Reference Library button



The Letters Show Table Screen includes multiple panels:

- The top panel is the My Filters and basic search options.
- The second panel is Additional Search Options, Search to execute a search, or Clear to clear the search criteria and search results.
- A row of Menu Buttons separates the Search Filters sections from the search results. Menu Buttons appear in the row depending upon user permissions.
- The Show Table panel provides the user with a listing letters that meet the search parameters specified by the user.



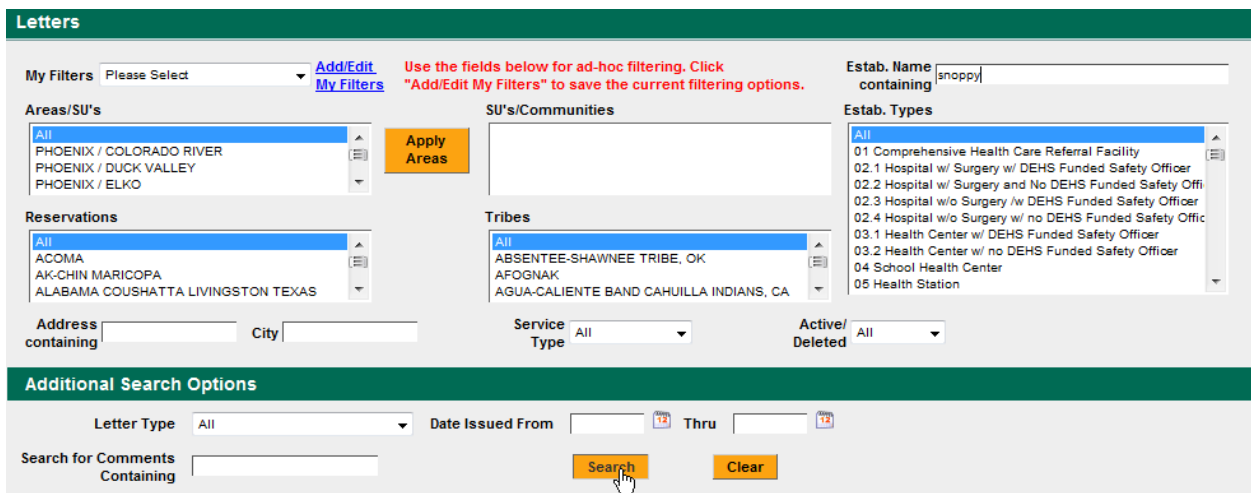
Note: Only select users have permissions to create templates. All users with permissions to modify an existing template are allowed to create letters using templates.

13.1 SEARCH

WebEHRS provides options for performing searches based on name, location, type, status, etc.

To Search for a Letter:

1. Click on the Letters tab at the top of the Menu Bar or the Letters button on Main Menu screen.
2. Enter search criteria by using the dropdowns or entering key words in the Description text box.
3. Click on the Search Button



WebEHRS performs the search based on the criteria entered and returns the results the Show Table panel. From the Letters Show Table Screen, the user can view, edit, print, or view the audit history of any given Letter record.

Estab. Name	Letter Type	Comments	Created By	Created On	Active/Deleted
SNOOPY'S BAKER AND COFFEE SHOP	IHS EH Survey Contact Letter	Letter text This is the first letter sent to this establishment, Follow-up may be required.	VGray	11/29/2011	Active

13.2 VIEW/SHOW LETTERS

To view a Letter:

1. Select the magnifier icon for the desired letter.

Estab. Name	Letter Type	Comments	Created By	Created On	Active/Deleted
SNOOPY'S BAKER AND COFFEE SHOP	IHS EH Survey Contact Letter	Letter text This is the first letter sent to this establishment, Follow-up may be required.	VGray	11/29/2011	Active

WebEHRS opens a new screen with a summary of information for the selected letter including any comments.

Letter Master [OK]

Estab. Name: SNOOPY'S BAKER AND COFFEE SHOP

Letter Type: IHS EH Survey Contact Letter

Mail To: Premise Address

Salutation: Ms Brown

Active/Deleted: Active

Text: This letter is to inform you that we may have an error in our records for the following:
Your phone number.

Comments: This is the first letter sent to this establishment, Follow-up may be required.

Created On: 11/29/2011

Last Updated: 11/29/2011

[OK]

We have tried to contact you several times but no one answered the call. Please contact our office at 555-555-

Note: If the user wants to review the text, place the cursor over the text section and a new window will open. The user may scroll down the window or expand the window to review all of the text for selected letter master.

2. Click OK to close the window and return to the Letters Show Table Screen.

13.3 ADD LETTERS

A new letter cannot be created from the Letters Module. To generate a new letter, the user must first go to the Establishments or Temporary Establishments Modules.

1. Click the Establishments or Temporary Establishment tab in the menu bar,
- Or
2. Click the Establishments or Temporary Establishment button on the Main Menu Screen.
 3. Search for the desired Establishment or Temporary Establishment (to receive the letter)
 4. Select the desired Establishment or Temporary Establishment using the check box in the Show Table Panel.
 5. Click on the Letters button.

Estab. #	Estab. Type	Premise Name	Primary Phone	Owner Name	Active/Deleted	EHS	Created By	Created On
6068421000	42 Bakery, Cannery, Bottling	SNOOPY'S BAKER AND COFFEE SHOP 4400 N CENTRAL AVE PHOENIX Arizona 85013	(502) 895-1999	4400 N CENTRAL AVE PHOENIX Arizona 85013	Active Open		VGray VGray	11/17/2011 12/2/2011

WebEHRS displays a screen from the Letters Module. The screen displays the Establishment Name, Address, and Establishment Type in the Establishment panel. Historical Letters (if any) are displayed in the Letter Master panel.

Establishment Return to Establishments

Estab. Name/Address
 SNOOPY'S BAKER AND COFFEE SHOP
 4400 N CENTRAL AVE
 PHOENIX Arizona 85013

Establishment Type
 42 Bakery, Cannery, Bottling

Letter Master

Letter Type	Comments	Created By	Created On	Active/Deleted

To add a new letter:

1. Click on the Add New button.

WebEHRS displays the Add Letter screen. Required fields are indicated with a small asterisk (*). Establishment information displays in the Establishment Panel, including Establishment Name, Address, and Establishment Type. In the Add Letter panel:

1. Select a Letter Type from the dropdown.

WebEHRS prefills the Letter Body text box with the Letter Template.

2. Select a Mail To from the dropdown.
3. Enter the name of the person(s) to which the letter is being addressed in Salutation (Optional).
4. Edit or enter additional text in Letter Body (Optional).
5. Enter Comments (Optional).

Note: Comments entered in the add letter panel will not appear in the letter. These comments are for documentation and search purposes only.

Establishment

Estab. Name/Address	Estab. Type
SNOOPY'S BAKER AND COFFEE SHOP 4400 N CENTRAL AVE PHOENIX Arizona 85013	42 Bakery, Cannery, Bottling

Add Letter Cancel

*** Indicates required field**

*** Letter Type** General Notification Letter

*** Mail To** Owner Address

Salutation Ms Brown Optional salutation field. If used, enter name of person letter is to be addressed to.

Our records indicate that we have one or more items for your establishment need to be updated. These include:

- Contacts
- Phone numbers
- Mailing Address.

*** Letter Body**

Please contact our office at 555-555-1234 to provide any corrections that are required. We need to schedule a survey of you establishment as soon as possible so you immediate attent is very appreciated. If you have any additional questions you may contact Charle Brown at 555-555-1234 ext. 567

Sincerely,

Comments

The text entered in the comments box WILL NOT appear in the letter generated. This is for documentation and search purposes only.

(Maximum characters: 2000)
You have 2000 characters left.

Save Cancel

Note: A text editor is provided for the Letter Body text box. The user may modify the body of the letter text using any of the formatting buttons available, such as Font, Font Size, Text Color, etc.

After all required fields are satisfied, the user may Save the Letter. To finish the Letter:

- Click on the Save button.

WebEHRS saves the letter and returns the user to the screen that displays the Establishment or Temporary Establishment and its Letter Master history. The newly created letter appears in the Letter Master Panel.

Establishment Return to Establishments

Estab. Name/Address SNOOPY'S BAKER AND COFFEE SHOP 4400 N CENTRAL AVE PHOENIX Arizona 85013	Establishment Type 42 Bakery, Cannery, Bottling
---	---

Letter Master

Add New Print on Letter Head Print on Blank Paper

	Letter Type	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
	General Notification Letter	Letter text	VGray VGray	12/14/2011 12/14/2011	Active
	IHS EH Survey Contact Letter	Letter text This is the first letter sent to this establishment. Follow-up may be required.	VGray VGray	11/29/2011 11/29/2011	Active

13.4 EDIT LETTERS

Once a Letter has been created for an Establishment, it will be stored in the database for future reference. Existing Letters can be edited, if necessary.

- Click on the Edit icon for the desired Letter.

Print on Letter Head Print on Blank Paper Audit

	Estab. Name	Letter Type	Comments	Created By Updated By	Created On Last Updated	Active/ Deleted
	SNOOPY'S BAKER AND COFFEE SHOP	IHS EH Survey Contact Letter	Letter text This is the first letter sent to this establishment. Follow-up may be required.	VGray VGray	11/29/2011 11/29/2011	Active

WebEHRS opens the Edit Letter screen. To edit the letter:

1. Make all necessary changes by adding/editing text values or using the dropdown list boxes.

After edits are completed, the user may Save or Cancel. Cancel will return the user to the previous screen without modifications. To Save changes:

- Click on the Save button.

13.5 PRINT LETTERS

After the Letter is created for an Establishment, it is ready for printing. WebEHRS provides two options for printing: Print On Letter Head or Print on Blank Paper.

Choose the Print on Letter Head button if the letter will be printed on pre-printed letter head stock paper.

Choose the Print on Blank Paper button if the letter will be printed with the appropriate letter head on blank paper.

To print:

1. Select the Letter by clicking the checkbox in the Show Table Panel.
2. Click on the Print on Letter Head button,

Or

3. Click on the Print on Blank Paper button.

Estab. Name	Letter Type	Comments	Created By	Created On	Active/Deleted
<input checked="" type="checkbox"/> SNOOPY'S BAKER AND COFFEE SHOP	IHS EH Survey Contact Letter	Letter text This is the first letter sent to this establishment, Follow-up may be required.	VGray VGray	11/29/2011 11/29/2011	Active

WebEHRS opens a new screen for a Print Preview.

- Click on the Printer button.

Environmental Health
AK CHIN INDIAN COMM. PAPAGO IND, AZ

To: SNOOPY'S BAKER AND COFFEE SHOP
4400 N CENTRAL AVE
PHOENIX AZ, 85013

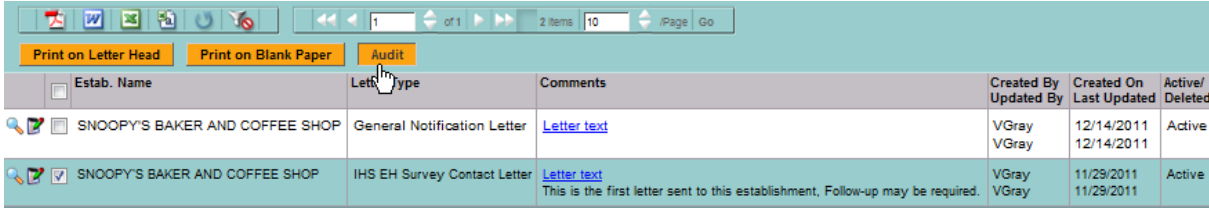
Dear Ms Brown,

This letter is to inform you that we may have an error in our records for the following:
Your phone number.
We have tried to contact you several times but no one answered the call. Please contact our office at 555-555-1234. We need to schedule a survey for Snoppy's Bakery as soon as possible. We look forward to hearing from you and appreciate your attention.
Sincerely,
Violet Gray

13.6 AUDIT LETTERS

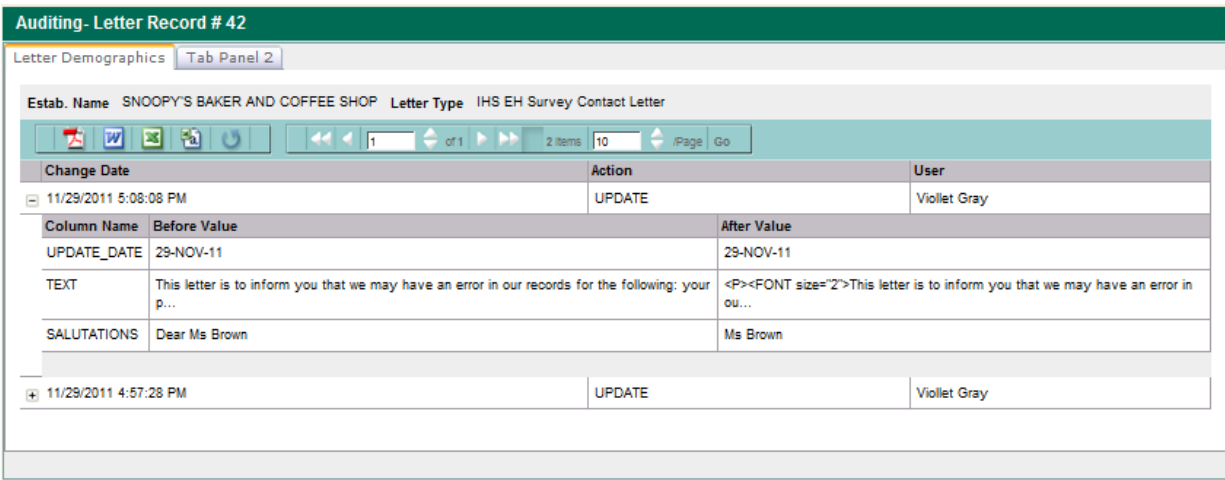
The Audit button allows the users to view the edit history for a Letter. To use the Audit button:

1. Select the desired Letter using the check box in the Show Table panel.
2. Click on the Audit button.



Estab. Name	Letter Type	Comments	Created By	Created On	Last Updated	Active/Deleted
SNOOPY'S BAKER AND COFFEE SHOP	General Notification Letter	Letter text	VGray	12/14/2011	12/14/2011	Active
SNOOPY'S BAKER AND COFFEE SHOP	IHS EH Survey Contact Letter	Letter text This is the first letter sent to this establishment, Follow-up may be required.	VGray	11/29/2011	11/29/2011	Active

WebEHRS opens the Audit screen in a new window. The Letters Audit screen shows the Establishment Name and Letter type for reference. The Audit history includes change date, action performed, and the name of the user that performed the action. The user may expand or collapse the sub-panels using the plus and minus icons next to the date of the change. By default the most recent change is expanded. In the expanded view, the screen displays the column name, and before and after values stored in the system.



Auditing - Letter Record # 42

Letter Demographics | Tab Panel 2

Estab. Name: SNOOPY'S BAKER AND COFFEE SHOP | Letter Type: IHS EH Survey Contact Letter

Change Date	Action	User
11/29/2011 5:08:08 PM	UPDATE	Viollet Gray

Column Name	Before Value	After Value
UPDATE_DATE	29-NOV-11	29-NOV-11
TEXT	This letter is to inform you that we may have an error in our records for the following: your p...	<P>This letter is to inform you that we may have an error in ou...
SALUTATIONS	Dear Ms Brown	Ms Brown

11/29/2011 4:57:28 PM	UPDATE	Viollet Gray
-----------------------	--------	--------------

Note: Some Audit screens, including the screen for letters may have more than one tab.

Note The Audit screen is a separate window and will need to be close after the User completes desired activities.

Users may also export the audit information in a variety of format including PDF, MS Word, or Excel using the icons on the Menu bar.



WebEHRS will create a new file and give the user the option to save or open. The following examples include a Microsoft Word Table and Excel Spreadsheet.

Exported Microsoft Word Table

Change Date	Action	User
11/29/2011	UPDATE	741

Export Microsoft Excel Spreadsheet

LETTER_MASTER

Letter Master Pkid	Created On	Created By	Last Updated	Updated By	Active/Deleted	Letter Type	Comments
42	11/29/2011	VGray	11/29/2011	VGray	Active	IHS EH Survey Contact Letter	This is the first letter sent to this establishment, Follow-up may be required.

14 REFERENCE LIBRARY

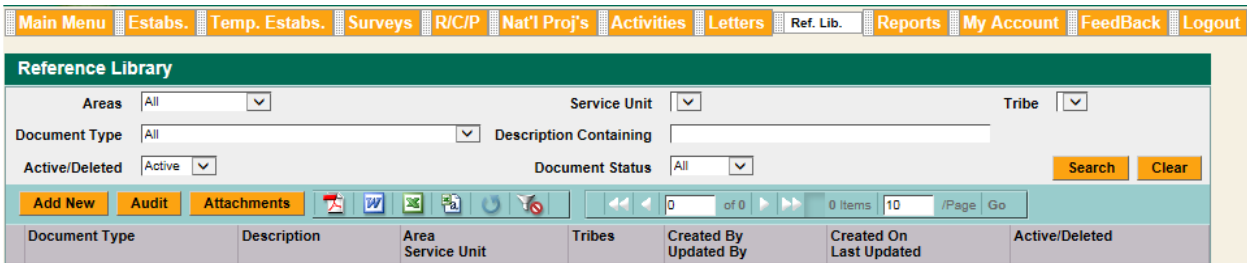
The Reference Library module allows users to search reference document type and descriptions, view documents, add new documents, and view the audit history of a document. The Reference Library Module can be accessed from the Main Menu or from the Main Menu Bar within other modules. To navigate to Reference Library from the Main Menu:

1. Click on the Reference Library button.



The Show Table Screen for Reference Library includes three panels:

- The top panel is the search panel and can be used to search document type, descriptions, active/deleted and status.
- A row of Menu Buttons separates the Search panel from the results set. Menu buttons appear in the row depending upon the user permissions.
- The Show Table provides the user with a listing of search results.



14.1 SEARCH REFERENCE LIBRARY

WebEHRS allows users to search the Reference Library for documents using a variety of data elements. To search the Reference Library:

1. Enter search criteria by using the dropdowns or entering key words in the Description text box.

2. Click on the Search button.

WebEHRS displays the results in the Show Table panel based on the search criteria.

Document Type	Description	Area Service Unit	Tribes	Created By Updated By	Created On Last Updated	Active/Deleted
<input type="checkbox"/> Blank Forms	WebEHRS Barber & Beauty Form	National All			6/10/2015 6/10/2015	Active
<input type="checkbox"/> Blank Forms	WebEHRS Home Assessment Form	National All			6/10/2015 6/10/2015	Active

To clear the search results:

- Click on the Clear button.

14.2 ADD DOCUMENT TO REFERENCE LIBRARY

To add a new document to the Reference Library:

1. Click on the Add New button in the Menu bar.

WebEHRS displays a screen for the user to enter information about the document. To continue adding a document to the Reference Library:

2. Select Area from the dropdown.
3. Select Service Unit from the dropdown (OPTIONAL).
4. Select Tribe from the dropdown (OPTIONAL).
5. Select Document Type from the dropdown.
6. Select Document Status from the dropdown.
7. Enter a Description in the text box.
8. Click on the Save button.

Add Reference Library
Cancel

* Indicates required field

* **Area**

Service Unit

Tribe

* **Document Type**

* **Document Status**

* **Description**

Please provide a description of the document being stored. This description is what you will be able to search against when looking for a document. (Note: It does not perform a word search against the contents of the document itself.)

[Spell Check](#)

(Maximum characters: 250)
 You have characters left.

Save
Cancel

WebEHRS saves the new Reference Library record into the database and returns the user to the Reference Library main screen. The newly created Reference Library record is displayed in the Show Table panel.

Reference Library								
Areas	<input type="text" value="National All"/>	Service Unit	<input type="text" value="--ANY--"/>	Tribe	<input type="text" value="--ANY--"/>			
Document Type	<input type="text" value="All"/>	Description Containing	<input type="text"/>					
Active/Deleted	<input type="text" value="Active"/>	Document Status	<input type="text" value="All"/>			Search	Clear	
Add New Audit Attachments								
1 of 1 10 items 10 /Page Go								
Document Type	Description	Area Service Unit	Tribes	Created By	Updated By	Created On	Last Updated	Active/Deleted
<input type="checkbox"/> National Standards	Draft survey reference guideline for determination...	National All _UNKNOWN- National All				6/29/2017	6/29/2017	Active

14.3 EDIT REFERENCE LIBRARY

Reference Library records can be edited. To edit an existing Reference Library record:

1. Perform a search to locate the existing Reference Library record.
2. Click on the edit icon.

Document Type	Description	Area Service Unit	Tribes	Created By	Updated By	Created On	Last Updated	Active/Deleted
<input type="checkbox"/> National Standards	Draft survey reference guideline for determination...	National All _UNKNOWN- National All				6/29/2017	6/29/2017	Active

WebEHRS opens the Edit Reference Library screen. The user may edit information using dropdown lists and text boxes.

To Save any changes, click on the Save button.

WebEHRS saves the changes and returns the user to the Reference Library Show Table screen.

Edit Reference Library

*** Indicates required field**

* Area: National All

Service Unit: []

Tribe: ** Please Select **

* Document Type: National Standards

* Document Status: Draft

* Description: Draft survey reference guideline for determination of overcrowding and potential public health risk for schools, residents/custodial care, and head start.
 (Maximum characters: 250)
 You have 96 characters left.

Please provide a description of the document being stored. This description is what you will be able to search against when looking for a document. (Note: It does not perform a word search against the contents of the document itself.)

Active/Deleted: Active

Save Cancel

To return to the Show Table screen without saving edits:

3. Click on the Cancel button.

14.4 AUDIT REFERENCE LIBRARY

To view a detailed Audit History of a Reference Library record:

1. Use the checkbox to select the desired Reference Library record from the Show Table panel.
2. Click on the Audit button.

Document Type	Description	Area Service Unit	Tribes	Created By Updated By	Created On Last Updated	Active/Deleted
National Standards	Draft survey reference guideline for determination...	National All UNKNOWN-National All			6/29/2017 6/29/2017	Active

WebEHRS opens the Audit screen in a new window. The Reference Library Audit screen shows the Document Type and Description for reference. The Audit history includes change date, action performed and the name of the user that performed the action. The user may expand or collapse the sub-panels using the plus and minus icons next to the date of the change. By default the most recent change is expanded. In the expanded view, the screen displays the column name, and before and after values stored in the system.

Auditing- Reference Library Record # 92

Reference Library Demographics | Tab Panel 2

Doc Type: National Standards | Description: Draft survey reference guideline for determination of overcrowding and potential public health risk for schools, residents/custodial care, and head start.

1 of 1 | 1 Items | 10 /Page | Go

Change Date	Action	User
12/22/2011 3:04:04 PM	UPDATE	Violet Gray

Column Name	Before Value	After Value
DESCRIPTION	Draft survey reference guideline for determination of overcrowding and potential public health risk ...	Draft survey reference guideline for determination of overcrowding and potential public health risk ...

14.5 ATTACHMENTS BUTTON

The Attachments button allows the user to view attachments associated with a selected Reference Library. To use the Attachments button:

1. Use the checkbox to select the desired Reference Library from the Show Table panel.
2. Click the Attachments button.

Add New | Audit | **Attachments** | 1 of 3 | 24 Items | 10 /Page | Go

Document Type	Description	Area Service Unit	Tribes	Created By	Created On / Last Updated	Active/Deleted
<input checked="" type="checkbox"/> National Standards	Draft survey reference guideline for determination...	National All _UNKNOWN- National All			6/29/2017 6/29/2017	Active

WebEHRS opens a pop-up window and displays the description and document type for the selected Reference Library.

Reference Library

Description: Draft survey reference guideline for determination of overcrowding and potential public health risk ... | Document Type: National Standards

Attachments

Active/Deleted: ACTIVE | Search | Clear

Upload | 1 of 1 | 1 Items | 10 /Page | Go

File Name	Document Type	Created On / Last Updated	Updated By	Active/Deleted
CrystalReportViewer1.pdf	Attendance Lists	1/11/2012 / 12/31/2013		ACTIVE

To upload a new attachment:

1. Click the Upload button.
2. Use the Browse button to search for the desired file.
3. Select a Document Type from the drop-down menu.
4. Click Save and Upload.

Attachment Upload

*** Indicates required field**

Please remember that excessively large files can take a long time to load. Click the Browse button below to select your file.

* File Name

* Document Type

The new attachment displays with the file name, document type, created on/last updated dates, updated by, and active/deleted status.

Reference Library

Description	Document Type
Draft survey reference guideline for determination of overcrowding and potential public health risk ...	National Standards

Attachments

Active/Deleted

of 1 /Page

	File Name	Document Type	Created On Last Updated	Updated By	Active/Deleted
	CrystalReportViewer1.pdf	Attendance Lists	1/11/2012 / 12/31/2013		ACTIVE
	Test Attachment.docx	Assessments	6/29/2017 / 6/29/2017		ACTIVE

To update or modify (replace) the attachment:

1. Click the Edit record icon.

Update/Modify Attachment

*** Indicates required field**

This allows you to update/modify the information in this pop-up. You cannot edit the document itself, but you can replace the document. Please remember that excessively large files can take a long time to load. Click the Browse button below to select your file.

File Name

Current File Name Test Attachment.docx

* Document Type

* Active/Deleted

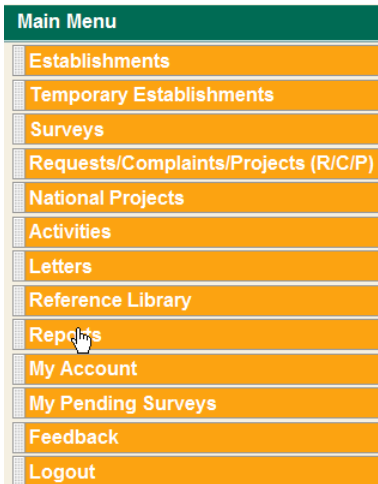
The document type and active/delete status can be modified, but the document itself cannot be edited; only replaced with a new document.

Click Save and/or Upload or Cancel without saving.

15 REPORTS

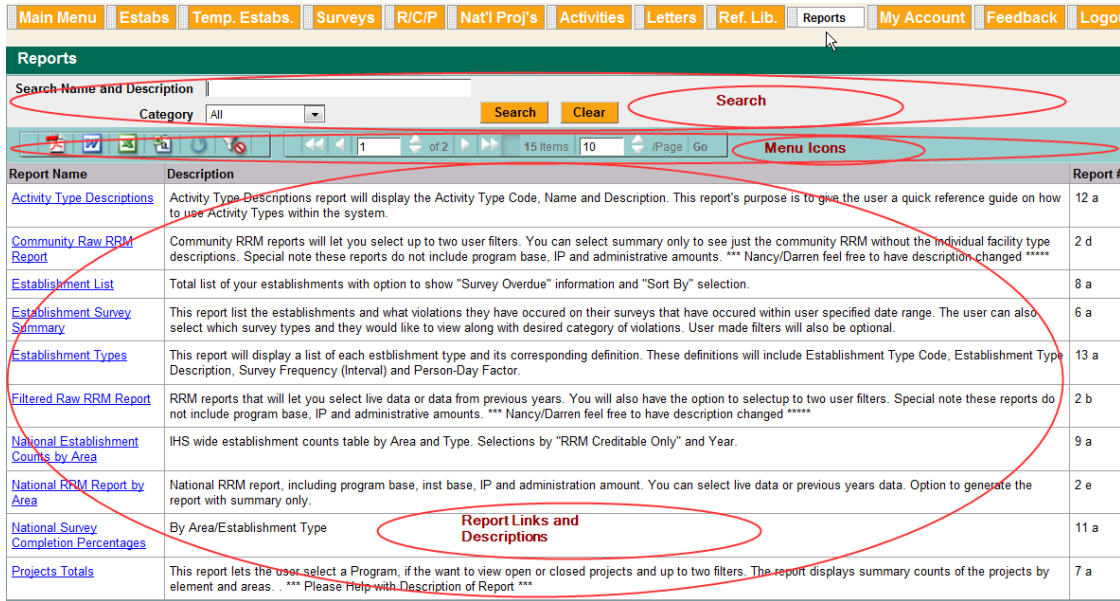
The Reports module allows users to generate, view and print reports. The Reports module can be accessed from the Main Menu or from the Main Menu Bar. To navigate to Reports from the Main Menu:

1. Click on the Reports button.



The main screen for Reports includes three panels:

- The top panel is the search panel and can be used to search report names and descriptions.
- A row of Menu Buttons separates the Search panel from the search results.
- The Show Table provides the user with a listing of search results. By default the Show Table lists all reports.

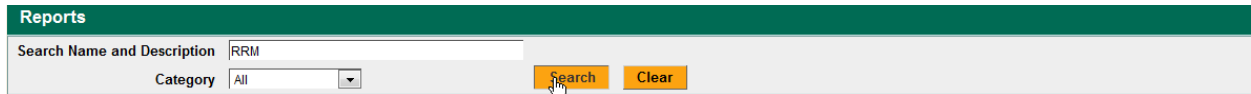


15.1 SEARCH REPORTS

WebEHRS allows users to search report names and descriptions.

To Search Reports:

1. Enter key words in Search Name and Description.
2. Click on the Search button.



WebEHRS display the results in the Show Table panel based the search criteria.

Report Name	Description	Report #
Community Raw RRM Report	Community RRM reports will let you select up to two user filters. You can select summary only to see just the community RRM without the individual facility type descriptions. Special note these reports do not include program base, IP and administrative amounts. *** Nancy/Darren feel free to have description changed *****	2 d
Filtered Raw RRM Report	RRM reports that will let you select live data or data from previous years. You will also have the option to select up to two user filters. Special note these reports do not include program base, IP and administrative amounts. *** Nancy/Darren feel free to have description changed *****	2 b
National Establishment Counts by Area	IHS wide establishment counts table by Area and Type. Selections by "RRM Creditable Only" and Year.	9 a
National RRM Report by Area	National RRM report, including program base, inst base, IP and administration amount. You can select live data or previous years data. Option to generate the report with summary only.	2 e
RRM Report	Total Area RRM report, including program base, inst base, IP and administration amount.	2 a
Raw RRM History	Report shows raw RRM history for all areas. Report has optional line graph for each area to graphical show the raw RRM for each year.	2 f
Tribal Raw RRM Report	Tribal RRM reports will let you select live data or data from previous years. You will also have the option to select up to two user filters. You can select summary only to see just the tribe RRM without the individual facility type descriptions. Special note these reports do not include program base, IP and administrative amounts. *** Nancy/Darren feel free to have description changed *****	2 c

To clear search results:

- Click on the Clear button.

WebEHRS displays the default Reports list in the Show Table panel.

15.2 ESTABLISHMENT LIST REPORT

To generate the Establishment List report:

1. Click on the “Establishment List” link in the Report Name column of the Show Table Panel.

Report Name	Description	Report #
Activity Type Descriptions	Activity Type Descriptions report will display the Activity Type Code, Name and Description. This report's purpose is to give the user a quick reference guide on how to use Activity Types within the system.	12 a
Community Raw RRM Report	Community RRM reports will let you select up to two user filters. You can select summary only to see just the community RRM without the individual facility type descriptions. Special note these reports do not include program base, IP and administrative amounts. *** Nancy/Darren feel free to have description changed *****	2 d
Establishment List	Total list of your establishments with option to show "Survey Overdue" information and "Sort By" selection.	8 a
Establishment Survey Summary	This report list the establishments and what violations they have occurred on their surveys that have occurred within user specified date range. The user can also select which survey types and they would like to view along with desired category of violations. User made filters will also be optional.	6 a

WebEHRS allows the user to specify report parameters. The Reports screen displays the Report Name and Report Description in the top panel. Report Parameters enable the user to generate the report using various data filters. Required parameters are indicated with a small red Asterisk (*). Many reports enable the user to set My Filters parameters. To continue with the Establishment List report:

2. Select Filter(s) using dropdown lists (OPTIONAL).
3. Select Sort By using dropdown lists.
4. Select Show Overdue indicators (Yes or No) using dropdown list.
5. Click on the View Report using these parameters button.

Report Cancel

Report Name Establishment List (Report Number=8a)

Description Total list of your establishments with option to show "Survey Overdue" information and "Sort By" selection.

Report Parameters

*** Indicates required field**

Select Filter: MY PHOENIX

Select Filter: PHOENIX AREA FOOD EST

* Sort By: Due Date

* Show Overdue Indicator: Yes

View Report using these parameters
Cancel

WebEHRS generates the report in a new Crystal Reports window. The user may view, export, and print the report. The user may also scroll pages, zoom in and out, and search the reports using the icons on the top panel of the screen.

Establishment List
Sorted by: Due Date

Establishment Name	Establishment Type	Community Code	Res. Code	Estab. Number	Tribe	Due Date
BQ Concession Stand	80 - Food Service Operations	PHOENIX	065	6066801000	AK CHIN INDIAN COM.M. PAPAGO IND, AZ	No Survey on File
Taco Stand	80 - Food Service Operations	PHOENIX	065	6066801000	AK CHIN INDIAN COM.M. PAPAGO IND, AZ	No Survey on File
Test for supplemental 2	80 - Food Service Operations	PHOENIX	065	6066801000	AK CHIN INDIAN COM.M. PAPAGO IND, AZ	No Survey on File
SNOOPY'S BAKER AND COFFEE SHOP	42 - Bakery, Confectionery, Bottling	PHOENIX	065	6066421000	AK CHIN INDIAN COM.M. PAPAGO IND, AZ	11/28/2011 Overdue
SNOOPY'S CAFE	47 - Cafe/Restaurant	PHOENIX	065	6066471000	AK CHIN INDIAN COM.M. PAPAGO IND, AZ	6/1/2012

Stats
 5 Facilities listed
 4 Facilities overdue
 20.0000% of the Facilities are up to date
 Report run on 12/19/2011 2:16:01PM

15.3 VIOLATION SUMMARY REPORT

To generate the Violation Summary report:

1. Click on the "Violation Summary Report" link in the Report Name column of the Show Table Panel.

Report Name	Description	Report #
RRM Report	Total Area RRM report, including program base, inst base, IP and administration amount.	2 a
Raw RRM History	Report shows raw RRM history for all areas. Report has optional line graph for each area to graphical show the raw RRM for each year.	2 f
Tribal Food Code Versions	Report will show which FDA form is currently being used for each tribe. Report is sorted by Area / Primary Provider / FDA Version / Tribe Name. *** Feel free to change/edit description ***	10 a
Tribal Raw RRM Report	Tribal RRM reports will let you select live data or data from previous years. You will also have the option to select up to two user filters. You can select summary only to see just the tribe RRM without the individual facility type descriptions. Special note: These reports do not include program base, IP and administrative amounts.	2 c
Violation Summary Report	The violation summary report will count all the violations that have occurred in a user chosen survey type. The violation count will comprise of the last survey given to the establishments within the user specified date range. If no date range is specified then the violation count will comprise of the last survey given to the establishments. The violation count will be grouped by violation category, the user also has the option to click on the violation category to get an individual count of ea...	1 a

Some WebEHRS reports are interactive and allow the user to “drill down” from high-level summary views into detailed, specific views. The Violation Summary Report is a good example of the “drill down” feature. To generate the Violation Summary Report:

WebEHRS allows the user to specify the report parameters. The Report Parameters screen displays the Report Name and Report Description in the top panel.

Report
Cancel

Report Name Violation Summary Report (Report Number=1a)

Description The violation summary report will count all the violations that have occurred in a user chosen survey type. The violation count will comprise of the last survey given to the establishments within the user specified date range. If no date range is specified then the violation count will comprise of the last survey given to the establishments. The violation count will be grouped by violation category, the user also has the option to click on the violation category to get an individual count of each violation within that violation category.

When running report use either the "Last Survey Completed" or the "Start Date/Ending Date" for Survey Completed.

The lower portion of the screen displays the Report Parameters. Report Parameters enable the user to generate the report through various data filters.

Required parameters are indicated with a small red asterisk (*). Many reports enable the user to set My Filters parameters. To continue with the Violation Summary Report:

2. Select a Survey Type using the dropdown list.
3. Select Last Survey Completed (Yes or No) using the dropdown lists.
4. Or enter “From Date” / “To Date” range.
5. Click on the View Report using these parameters button.

NOTE: If Show Repeat Violations, Show Corrected On Site Violations, or Show Critical Violations is left as “Please Select,” WebEHRS will default those filters to “Yes.”

Report Parameters

*** Indicates required field**

*** Select a Survey Type**

**** Last Survey Completed ****

Enter "From Date" in MM/DD/YYYY format

Enter "To Date" in MM/DD/YYYY format

Select Filter

Select Filter

Show Repeat Violations

Show Corrected On Site Violations

Show Critical Violations

View Report using these parameters
Cancel

WebEHRS generates the report in a new Crystal Reports window. The user may view, export, and print the report. The user may also scroll pages, zoom in and out and search the reports using the icons on the top panel of the screen.

Group Tree
1 / 1
100%

CRYSTAL REPORTS® 2008

Main Report

IHS

Violation Summary Report Based on Last Establishment Survey

Category	Total Count	% of Counts	Repeat Count	% of Repeats	COS Count	% of COS	Critical Count	% of Criticals
Approved Source	3	8.6%	3	21.4%	2	9.5%	0	0.0%
Conformance with Approved Procedures	1	2.9%	0	0.0%	0	0.0%	0	0.0%
Control of Hands as a Vehicle of Contamination	4	11.4%	1	7.1%	3	14.3%	0	0.0%
Demonstration of Knowledge	3	8.6%	0	0.0%	1	4.8%	0	0.0%
Employee Health	4	11.4%	1	7.1%	3	14.3%	0	0.0%
Good Hygienic Practices	5	14.3%	2	14.3%	2	9.5%	0	0.0%
GOOD RETAIL PRACTICES - Physical Facilities	4	11.4%	2	14.3%	2	9.5%	0	0.0%
GOOD RETAIL PRACTICES - Proper Use of Utensils	3	8.6%	2	14.3%	1	4.8%	0	0.0%
GOOD RETAIL PRACTICES - Safe Food and Water	2	5.7%	1	7.1%	1	4.8%	0	0.0%
GOOD RETAIL PRACTICES - Utensil, Equipment and Vending	1	2.9%	0	0.0%	1	4.8%	0	0.0%
Potentially Hazardous Food Time/Temperature	4	11.4%	2	14.3%	4	19.0%	0	0.0%
Protection from Contamination	1	2.9%	0	0.0%	1	4.8%	0	0.0%
TOTALS:	35		14	40.0%	21	60.0%	0	0.0%

Some WebEHRS reports are interactive and allow the user to “drill down” from high-level summary views into detailed, specific views. The Violation Summary Report is equipped with the “drill down” feature. The Violations Summary Report allows the user to click on the

Category name to view the specific violation counts in a new tab of the Crystal Report viewer. To view additional tabs:

- Click on the Approved Source link in the report.

IHS
Violation Summary Report Based on Last Establishment Survey

Category	Total Count	% of Counts	Repeat Count	% of Repeats	COS Count	% of COS	Critical Count	% of Criticals
Approved Source	3	8.6%	3	21.4%	2	9.5%	0	0.0%
Conformance with Approved Procedures	1	2.9%	0	0.0%	0	0.0%	0	0.0%
Control of Hands as a Vehicle of Contamination	4	11.4%	1	7.1%	3	14.3%	0	0.0%
Demonstration of Knowledge	3	8.6%	0	0.0%	1	4.8%	0	0.0%
Employee Health	4	11.4%	1	7.1%	3	14.3%	0	0.0%
Good Hygienic Practices	5	14.3%	2	14.3%	2	9.5%	0	0.0%
GOOD RETAIL PRACTICES - Physical Facilities	4	11.4%	2	14.3%	2	9.5%	0	0.0%
GOOD RETAIL PRACTICES - Proper Use of Utensils	3	8.6%	2	14.3%	1	4.8%	0	0.0%
GOOD RETAIL PRACTICES - Safe Food and Water	2	5.7%	1	7.1%	1	4.8%	0	0.0%
GOOD RETAIL PRACTICES - Utensil, Equipment and Vending	1	2.9%	0	0.0%	1	4.8%	0	0.0%
Potentially Hazardous Food Time/Temperature	4	11.4%	2	14.3%	4	19.0%	0	0.0%
Protection from Contamination	1	2.9%	0	0.0%	1	4.8%	0	0.0%
TOTALS:	35		14	40.0%	21	60.0%	0	0.0%

WebEHRS opens a new tab within the Crystal Report viewer. The user may return to the Main Report tab and click on additional Category links to open multiple sub-tabs at once. (The screen shot below shows four open tabs from the drill-down.)

Group Tree | 1 / 1 | 100%
CRYSTAL REPORTS 2008

Main Report
Approved Source X
Good Hygienic Practices X
Potentially Hazardous Food Time/Temperature X

Potentially Hazardous Food Time/Temperature								
Violation	Viol Count	% of Counts	Repeat Count	% of Repeats	COS Count	% of COS	Critical Count	% of Criticals
17. Proper reheating procedures for hot holding	1	25.0%	0	0.0%	1	25.0%	0	0.0%
21. Proper date marking, disposition	2	50.0%	2	100.0%	2	50.0%	0	0.0%
22. Time as a public health control: procedures, records	1	25.0%	0	0.0%	1	25.0%	0	0.0%
			2	50.0%	4	100.0%	0	0.0%

APPENDIX A - ACRONYMS, ABBREVIATIONS, AND DEFINITIONS

A.1 ACRONYMS AND ABBREVIATIONS

Acronym/Abbreviations	Definition
CDP	Custom Data Processing
CDPehs	Custom Data Processing enterprise health systems
COTS	Commercial Off-the-shelf
DEHS	Division of Environmental Health Services
DMS	Document Management System
DHHS	Department of Health and Human Services
FDA	Food and Drug Administration
EH/IEH/IP	Environmental Health/Institutional Environmental Health/Injury Prevention
Estabs.	Establishments
IE	Internet Explorer
IHS	Indian Health Service
Nat'l Projs.	National Projects
NIST	National Institutes of Standards and Technology
MS	Microsoft
O&M	Operation and Maintenance
OEHE	Office of Environmental Health and Engineering
Ref. Lib.	Reference Library
R/C/P	Request/Complaint/Project
RRM	Resource Requirements Methodology
SME	Subject Matter Expert
SU	Service Unit
Temp. Estabs.	Temporary Establishments
WebEHRS	Web Environmental Health Reporting System
24/7	24 hours a day/7 days a week

A.2 DEFINITIONS

- Panel – Used to refer to the different sections found on one screen (e.g., My Filters panel, Search panel, Show Table panel).
- Screen – Same as a web page (e.g., Establishment Show Table, Add Establishment Screen, Reports Screen).

APPENDIX B - USER LEVEL AND ROLES

User Level/Role	What the User Can Access By Module				
	Main Menu	Top Menu Bar	My Account Page	"My Filters"	Establishments
System Administrator	All Options	All Options	Full Access	Full Access	Full Access
System Backup Administrator	All Options	All Options	Full Access	Full Access	Full Access
HQ EH Program Director	All Options	All Options	Only "User Functions" column and "Edit User Accounts"	Full Access	Full Access
HQ EH Program Deputy	All Options	All Options	Only "User Functions" column and "Edit User Accounts"	Full Access	Full Access
HQ Staff	All Options	All Options	Only "User Functions" column	Full Access	Full Access
Area EH Program Director	All Options	All Options	Only "User Functions" column and "Edit User Accounts"	Full Access	Full Access
Area EH Program Deputy	All Options	All Options	Only "User Functions" column and "Edit User Accounts"	Full Access	Full Access
Area EH Staff	All Options	All Options	Only "User Functions" column	Full Access	Full Access
District EH Program Manager	All Options	All Options	Only "User Functions" column	Full Access	Full Access
District EH Program Deputy	All Options	All Options	Only "User Functions" column	Full Access	Full Access
District EH Staff	All Options	All Options	Only "User Functions" column	Full Access	Full Access
Field EH Program Manager	All Options	All Options	Only "User Functions" column	Full Access	Full Access
Field EH Staff	All Options	All Options	Only "User Functions" column	Full Access	Full Access
COSTEP	All Options	All Options	Only "User Functions" column	Full Access	Full Access
Read Only	All Options	All Options	Only "User Functions" column	Full Access	Read Only

What the User Can Access By Module			
User Level/Role	R/C/P	Nat'l Proj's - All	Nat'l Proj's - Specific
System Administrator	Full Access - Can Delete Projects created by lower level users	Full Access	Full Access
System Backup Administrator	Full Access - Can Delete Projects created by lower level users	Full Access	Full Access
HQ EH Program Director	Full Access - Can Delete Projects created by lower level users	Full Access	Full Access
HQ EH Program Deputy	Full Access - Can Delete Projects created by lower level users	Full Access	Full Access
HQ Staff	Full Access - Can Delete Projects created by lower level users	Full Access	Full Access
Area EH Program Director	Full Access - Can Delete Projects created by lower level users	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
Area EH Program Deputy	Full Access - Can Delete Projects created by lower level users	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
Area EH Staff	Full Access - Can Delete Projects created by lower level users	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
District EH Program Manager	Full Access - Can Delete Projects created by lower level users	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
District EH Program Deputy	Full Access - Can Delete Projects created by lower level users	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
District EH Staff	Full Access - Can Delete Projects created by lower level users	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
Field EH Program Manager	Full Access - Can Delete Projects created by lower level users	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
Field EH Staff	Full Access - Can Delete Projects created by lower level users	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
COSTEP	Full Access	Can Add Activities, Documents, and Surveys to "National All" projects	Can Add Activities, Documents, and Surveys to projects based on permissions
Read Only	Read Only	Read Only	Read Only

What the User Can Access By Module							
User Level/Role	Activities	Surveys	Reports	Reference Library	Letters	Feedback	Numbers
System Administrator	Full Access	Full Access	Full Access	Full Access	Full Access	Full Access	1
System Backup Administrator	Full Access	Full Access	Full Access	Full Access	Full Access	Full Access	1
HQ EH Program Director	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	2
HQ EH Program Deputy	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	2
HQ Staff	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	3
Area EH Program Director	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	4
Area EH Program Deputy	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	4
Area EH Staff	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	5
District EH Program Manager	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	6
District EH Program Deputy	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	6
District EH Staff	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	7
Field EH Program Manager	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	8
Field EH Staff	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	9
COSTEP	Full Access	Full Access	Full Access	Full Access	Full Access	Enter report only	10
Read Only	Read Only	Read Only	Full Access	Read Only	Read Only	Enter report only	11

APPENDIX C - USING FILTERS

Understanding how to use filters in WebEHRS will enable you to organize your data in a way that may make more sense to you and those you serve. The tutorial below walks you through the concepts of what filters are and how to use them.

In our graphic example, we are working with a district that has three service units: 22, 24, and 26.



When we log into WebEHRS or run reports, all of the facilities for these service units appear.

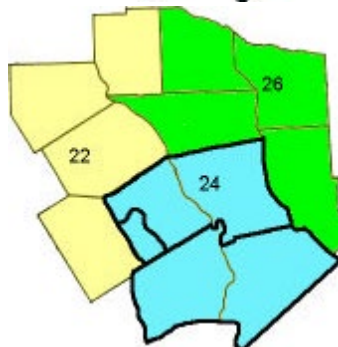
Maybe we just want to look at one of our service units #24



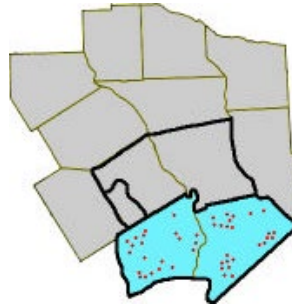
Or, within that service unit, just the tree tribes that we serve.



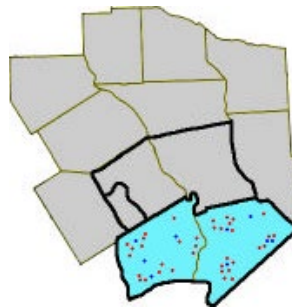
For more detail, maybe we just want to look at the data and reports for one tribe.



Or for more clarity on a specific set of services that we provide...



Just certain type of facilities...



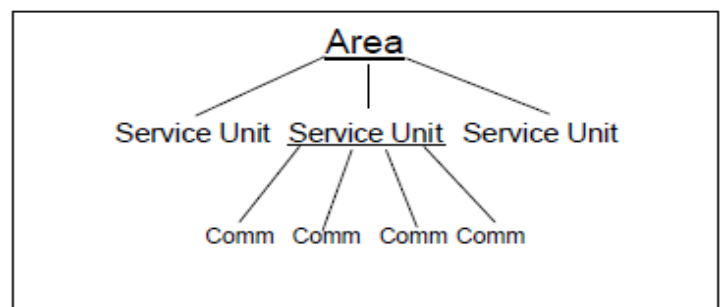
...or maybe even just one type of facility.



Filters allow the user to do use all these filters with the WebEHRS data. Users may have as many filters as desire. There is no limit.

Getting what the user want out of filters requires an understanding of what facility data is filtered and the relationships used to manage the data in WebEHRS.

The chart to the right shows the data relationship



Notice that Tribes, Reservations, District or the Custom Fields A1 ad A2 are not in the chant about.

This is because they are independent. There is no defined relationship with the HIS dataset to link there items.

C.1 COMMON MISTAKES WITH FILTERS

The most common mistake people make when building filters is doing too much.

The available fields for a filter are:

- Area/Service Unit
- Tribe
- Facility Name
- Facility Type
- Reservation Code
- Area Specific 1
- Area Specific 2

If the user needs a list of facilities that only includes 3 types of facilities, Then only select those three facility types...there is no need to select anything in any of the other fields to filter.

If the user wants to see the RRM for a particular Service Unit...again, select only that Service units. Trying to select all of the tribes that may be in that service unit may cause the user to miss the Federal Facilities in that service unit. Plus...it is more work than necessary.

If data has been correctly entered, what the user EXPECTS to see is what the user SHOULD SEE.

IMPORTANT

Users will only be able to filter facilities based on accounts permissions...meaning that a user can't filter with something that they don't have.