

Preparation for the Initial Renewal Application run

Follow the Billing manual and check out the Billing settings training recordings to set up all billing rules in your system.

The steps identified in this document will help with billing preparedness for a Permit run in which permits have not yet been generated in the system.

Configuration Details	
Financial Year End Feb 28 2015 16	Permit Renewal Number of Days (Prior to permit expiration date) 90
Permit Renewal Health Unit Remittance Information	Invoice Health Unit Remittance Information

Step 1. In Billing/Configuration/Billing Settings - Set the Financial Year end date field. This should show the last day of the upcoming licensing year for the module you are running.

An example is the food module. If you are running Renewal fees and applications for the licensing period March 1 2014 - Feb 28 2015, the Financial Year end should be Feb 28, 2015.

Please Note: For the food module though you will use the last day of February as the last day of the permit, we have hard coded the License to expire on March 1.

Step 2. Renewal number of days field. In this field enter how many days before the current license expires should the upcoming fees and Renewal applications be generated.

Step 3. Move to the Billing/Billable Facilities/Problems view. This should be an empty view. If there are documents in this view, select and use the Clear button. Do not select and delete, as you do not want to delete any facility documents, you just need to clear a back end value that shows any previous problems. At this time there would be no reason to try and resolve a problem. If it is still a problem it will be identified in your next billing run, and can be properly resolved at that time.

Name	Form	Problem ^
✓ Auntie Anne's	Food Facility	This facility has an existing unpaid permit fee. This facility h
✓ Diebold Global Gateway Facility - Cafe	Food Facility	This facility has an existing unpaid permit fee. This facility h
✓ Econo Lodge	Hotels / Motel	No fee configurations were found for a Permit of this type. (
✓ Express Catering	Food Facility	This facility has an existing unpaid permit fee. This facility h
✓ Family Dollar Store #8616	Food Facility	This facility has an existing unpaid permit fee. This facility h
✓ For Evers Kids LLC	Food Facility	This facility has an existing unpaid permit fee. This facility h

Step 4. If you have made any changes to Billing type names, facility type names, or fee amounts move to Billing/Configuration/Fee documents the Fee documents and update the fee documents.

Step 5. Application forms. Move to the Administration/Configuration/PrintForms view. There should be a document entitled Permit Renewal under the Module twistie. The naming of the document is

important. Both the title of the document and module must be correctly named if the billing agents are to find them. The screen shot provided shows the correct module name and form names.

Administration	Name	Description
<ul style="list-style-type: none"> ▼ Configuration <ul style="list-style-type: none"> ▶ System Settings ▶ Land Development Settings ▶ Configuration Center ▶ Broadcast Message ▼ Print Forms <ul style="list-style-type: none"> ▶ Print Forms ▶ Print Form Tags ▶ System Tags Reference ▶ Offices ▶ Reports & Tools ▶ Risk Weights 	<ul style="list-style-type: none"> ▼ Food <ul style="list-style-type: none"> Examples of CCP Elements Examples of Elements Permit Renewal Permit Renewal Cover Letter Permit Renewal Late Letter One Permit Renewal Late Letter Three Permit Renewal Late Letter Two Temporary Food Application 	<ul style="list-style-type: none"> Examples of CCP Elements Examples of Elements Food Application for License Renewal Food license renewal application cover letter Notice of Failure to Renew Food License 1 Notice of Failure to Renew Food License 3 Notice of Failure to Renew Food License 2 Temporary license application with visible tables
	<ul style="list-style-type: none"> ▼ Food Vending <ul style="list-style-type: none"> Combined Facility Permit Renewal Continuation Combined Facility Permit Renewal Cover Letter Permit Renewal Permit Renewal Cover Letter Permit Renewal Late Letter One Permit Renewal Late Letter Three Permit Renewal Late Letter Two 	<ul style="list-style-type: none"> Vending machine location license renewal application cover letter Vending machine location license renewal application cover letter Notice of Failure to Renew Food Vending Machine Location License Notice of Failure to Renew Food Vending Machine Location License Notice of Failure to Renew Food Vending Machine Location License
	<ul style="list-style-type: none"> ▼ Pool <ul style="list-style-type: none"> Permit Renewal Permit Renewal Cover Letter Permit Renewal Late Letter One Permit Renewal Late Letter Three Permit Renewal Late Letter Two 	<ul style="list-style-type: none"> Pool Application for License Renewal Pool/Spa license renewal application cover letter Notice of Failure to Renew Pool/Spa License 1 Notice of Failure to Renew Pool/Spa License 3 Notice of Failure to Renew Pool/Spa License 2
	<ul style="list-style-type: none"> ▼ RV Park/Camp <ul style="list-style-type: none"> Permit Renewal Permit Renewal Cover Letter Permit Renewal Late Letter One Permit Renewal Late Letter Three Permit Renewal Late Letter Two 	<ul style="list-style-type: none"> RV Park/Camp Application for License Renewal License renewal application cover letter Notice of Failure to Renew RV Park/Camp License 1 Notice of Failure to Renew RV Park/Camp License 3 Notice of Failure to Renew RV Park/Camp License 2

Step 6. Cover letter, if the Permit Renewal document indicates that a cover letter will be used with the module, a cover letter for that module must be available and correctly named.

Once this information is correct, contact HealthSpace to run first billing batch for the module(s)

If HealthSpace generates fees and Renewal applications for your LHD, These will be found in the Billing/Renewal and Invoices/Ready to Print view.

Food Vending Renewal applications. Fees are generated for each Vending location in the same way that permit fees are generated for any Food facility type. The difference will be in the creation of the Renewal application document. These are generated manually rather than by batch.

To run the Renewal application for the Vending facilities, move to the Billing/Business Combined Renewals view. Open the Business document and choose Create/Combined Facilities Renewal Application. This will run a tool that looks for unpaid/un-invoiced permit fees for all facilities operated by this Licensee. These will come up in a list. Choose OK to create the application form, and print with the form open on screen, or close to select and print the application from the view.

Troubleshooting incomplete billing processes:

If some or all of the expected renewal documents do not show up in the Billing/Renewals and Invoices/ready to Print view, it may be that Fees did not generate or that applications did not generate.

Check the view Billing/ Fees by End Month. This view should show all the fees that were created overnight. You can compare the number of fees with the number of permitted facilities in the Billing/Billable Facilities by Type view. If there are some fees there but not all, move to the Billing/Billable facilities/Problems view to investigate.

The Billing/ Billable Facilities/Problems view identifies any facilities that had no fee created because there was a problem with the data on that facility. The reason will be stated next to the facility name. Some reasons might be that an owner is not found for that facility, or that there is no fee document that meets the facilities type/billing type combination. Resolve the issue and then either manually run the annual fee by going into the individual facility and clicking on Create Annual Fee and Create Renewal, or let the system take over, and it will run over night.

Fees were not generated

If you do not see any fees created in the Fees by End month view, for the correct financial year, check the number of days to be sure that you are within the correct time range.

Open a facility document where you had expected a fee to be generated.

Does it have an Issue and expiration date on the facility in the Operating information table that has the correct end date and year. If there is no value, this facility will not be part of the automated renewal process.

Was a previous permit issued for this facility? If not, this facility will not be part of the automated renewal process. If all the facilities fall into this problem, see the note at the top of this document. This will be a first time run for these facilities and will need to have a different process followed for the running this renewal.

If previous permits have been issued to the facility, and it does have the correct issue and expiration dates on the operating table, but fees did not generate, please contact HealthSpace support for a deeper look into the issue.

Fee Generated but Invoices did not generate

If fees generated but Invoices did not, go to one of the facilities from the Fees by End month view and click on the Create Renewal button. The message should indicate the reason the Renewals did not generate. It may be that the correct Permit renewal or Cover letter Print form was not found. The message should indicate the module format and the print naming convention.

Move to the Administration/Configuration/Print forms view. For the Module you are working with check the name, is it called Permit Renewal, is it called by the right name, is there any spacing issues between what the message provided and what you see on the document. Once corrected, the renewals will run overnight.

No Cover Letter - If the Permit Renewal indicates that a cover letter should be printed as well as a Permit Renewal document, be sure that a cover letter is available for that module, and that it is named correctly.

If the message when trying to run refers to the cover letter not being found, you will either need to deselect the cover letter option on the Print Renewal document, or set up a cover letter or check the naming of the cover letter. Once corrected, the renewals will run overnight.

If all these measures have been explored, but permit renewal applications did not run as intended, please contact HealthSpace support.