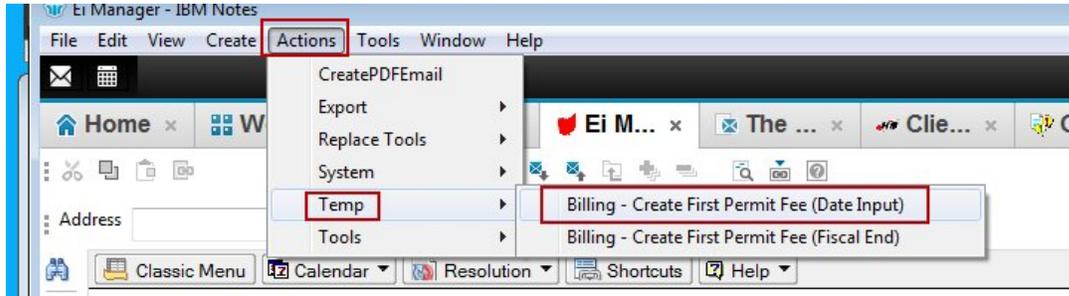


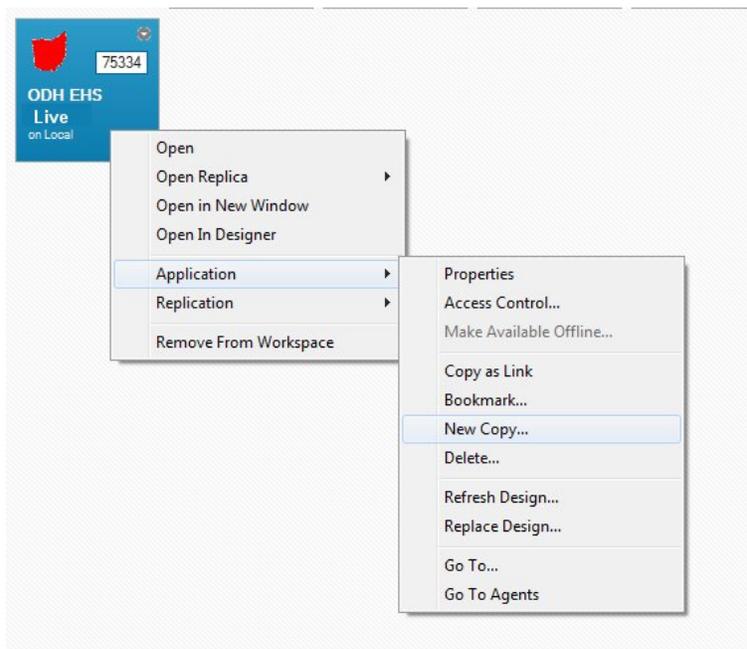
To run a manual test for renewal applications, Look under the Actions menu for Temp/Billing - Create First Permit Fee (Date Input)  
If you do not see this tool, please contact HealthSpace support at 1-866-860-4224 who will copy the tool into your database. Once this is in the database you will proceed by making a copy of your Live database.



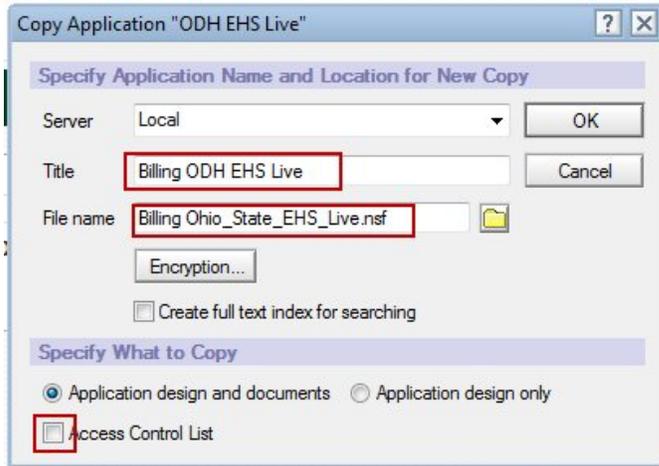
Setting up a billing copy:

From the workspace, right click on your Live on Local Database.

Choose Application / New Copy



In the little box that comes up add Billing to the title and the file name  
Deselect the check box for access control, then click on OK.

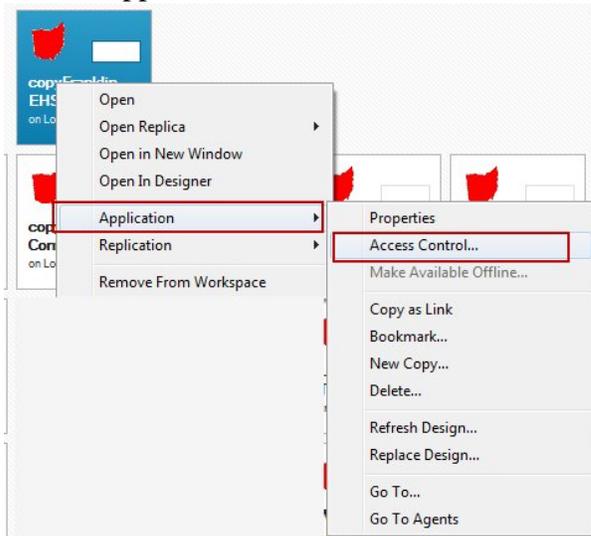


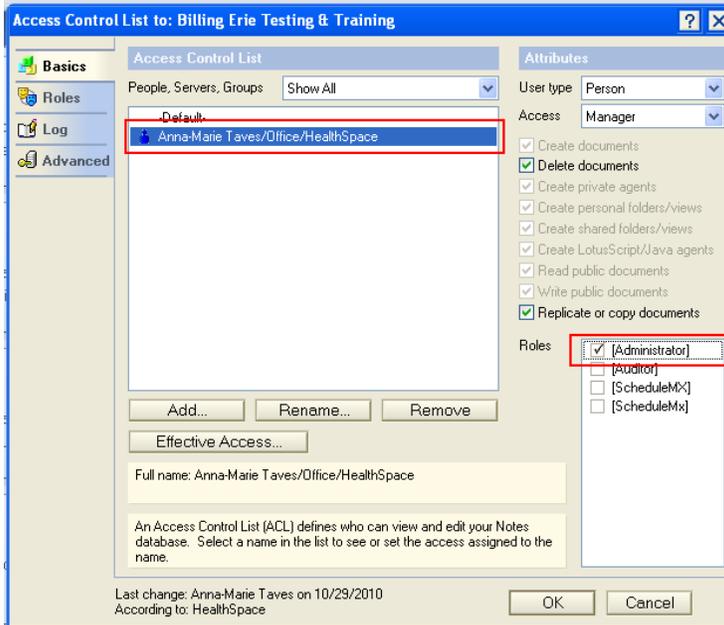
This will begin the process of creating the Billing copy your Live database.

Once complete you will have the copy of the database on your workspace.

Now you need to set up your access for this database...

Find the Billing copy of the database on the workspace. Right click on the database and choose Application / Access Control





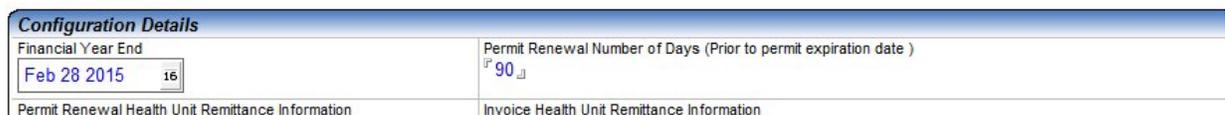
Click on your name and select Administrator in the Roles list. Click on “OK” and you are ready to open the database and test billing.

**NOTE:**

This is a throwaway database. It can be used to test various functions in this case your Billing processes. What it will NOT do is work with the violations database; it is completely stand alone.

**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.



**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, HealthSpace has 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.** 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.

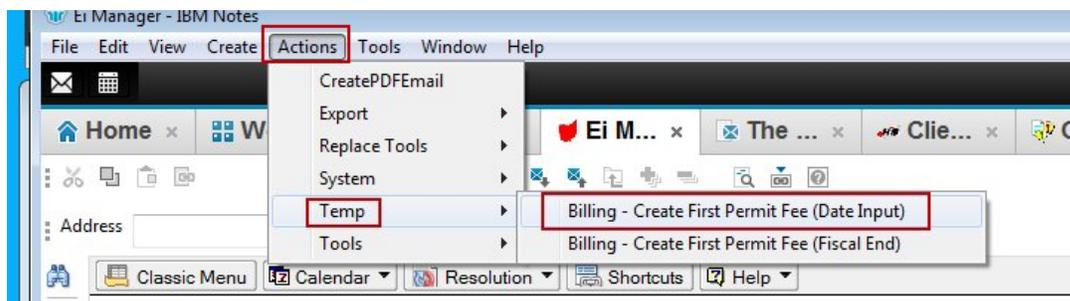
**Step 4.** Application forms. Move to the Administration/Configuration/PrintForms view. There should be a document entitled Permit Renewal under the Module twistie. The naming of the document is important. Both the title of the document and module must be correctly named if the billing agents are to find them. The screen shot provided shows the correct module name and form names.

Name	Description
<b>Food</b>	
Examples of CCP Elements	Examples of CCP Elements
Examples of Elements	Examples of CCP Elements
Permit Renewal	Food Application for License Renewal
Permit Renewal Cover Letter	Food license renewal application cover letter
Permit Renewal Late Letter One	Notice of Failure to Renew Food License 1
Permit Renewal Late Letter Three	Notice of Failure to Renew Food License 3
Permit Renewal Late Letter Two	Notice of Failure to Renew Food License 2
Temporary Food Application	Temporary license application with visible tables
<b>Food Vending</b>	
Combined Facility Permit Renewal Continuation	
Combined Facility Permit Renewal Cover Letter	Vending machine location license renewal application cover letter
Permit Renewal	
Permit Renewal Cover Letter	Vending machine location license renewal application cover letter
Permit Renewal Late Letter One	Notice of Failure to Renew Food Vending Machine Location License
Permit Renewal Late Letter Three	Notice of Failure to Renew Food Vending Machine Location License
Permit Renewal Late Letter Two	Notice of Failure to Renew Food Vending Machine Location License
<b>Pool</b>	
Permit Renewal	Pool Application for License Renewal
Permit Renewal Cover Letter	Pool/Spa license renewal application cover letter
Permit Renewal Late Letter One	Notice of Failure to Renew Pool/Spa License 1
Permit Renewal Late Letter Three	Notice of Failure to Renew Pool/Spa License 3
Permit Renewal Late Letter Two	Notice of Failure to Renew Pool/Spa License 2
<b>RV Park/Camp</b>	
Permit Renewal	RV Park/Camp Application for License Renewal
Permit Renewal Cover Letter	License renewal application cover letter
Permit Renewal Late Letter One	Notice of Failure to Renew RV Park/Camp License 1
Permit Renewal Late Letter Three	Notice of Failure to Renew RV Park/Camp License 3
Permit Renewal Late Letter Two	Notice of Failure to Renew RV Park/Camp License 2

**Step 5.** 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.

**Step 6:** Move to the Billing/Facilities/ by Type view. Open the twisties and select all facilities of the type that require the first License fee.

**Step 7:** Select the tool from the Actions bar, Temp/Billing - Create First Permit Fee (Date Input).



A box will come up to enter the start date of the License year (For Food this will be March 1, 2014) and then another box will allow you to enter the end date (For Food this will be Feb 28, 2015). After selecting "OK" the Permit fees will run. This may take up to 15 minutes so allow yourself enough time.

**Step 8.** When this has completed, move to the Billing/Facilities/Problems view to determine which facilities did not get fees generated. An email will also be generated that give the results of the fee generation. Both the view and the email will give the reasons that any fees did not generate.

NOTE: This problem should be corrected in your Live database so that the fee will generate when Live billing is run. Remember, Correcting it in the Copy of the database will not correct it in Live.

**Step 9.** Move back to the Billing Facilities by type view and use the button called Generate renewals.

The screenshot shows the HealthSpace software interface. On the left is a navigation menu with 'Billing' selected. Under 'Billing', 'By Type' is highlighted with a red box. The main window displays a table titled 'Search in View 'Billing\Facilities\By Type''. The table has columns for 'Total', 'Facility', 'Facility ID', 'Start Date', and 'End Date'. The data rows are as follows:

Total	Facility	Facility ID	Start Date	End Date
9	Aviary			
12	Beach			
26	Bodyart			
37	Campground			
3593	Food			
1701	Commercial FSO < 25000 sq. ft.			

You will not have to select facilities with this tool. It was built to find and generate renewal applications for all permit fees that do not yet have a renewal. If renewals and invoices have never been run in the database you will be asked to create an invoice prefix to allow for the numbering of renewal applications. You may feel free to choose anything for this prefix. I usually use my initials. Once this has been set, the renewal applications will run.

Please note: these can take significantly longer than creating the fees. Allow one to 2 hours where the EHDSI program will be open and running. You will not be able to do anything else in the program while these applications run.

Once generated, a text document will be generated with the results of the billing run. The renewal applications will be found in the Billing/Renewal and Invoices/Ready to Print view.

Confirm that the number of renewals match the number of facilities through the text document and numbers in the view, EXCLUDING the number of vending facilities. These renewal applications will be run separately.

If the renewal numbers do not match, review the troubleshooting section on this document or contact HealthSpace for a gotomeeting to determine what the issue might be.

**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.