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HSTouch for iPads – Field

When using the iPad, you have two options. You can connect to CloudSuite through a browser online via Wi-Fi or a hotspot (i.e., Chrome) or you can use the HSTouch app offline. These directions are for how to use the app.

Familiarize with the iPad and iOS:

- Visit https://support.apple.com/guide/ipad/welcome/ipados for more information about iPads an their operating system.

Important things to know:

- **Do not** forget your iPad passcode (PIN)! We recommend that all staff in a county use the same passcode (PIN) for ease of recovery.
- You must login to the HSTouch app once a week or so to keep it updated and working smoothly. If you are out of the office for a few weeks, you should uninstall the app and reinstall from scratch for best performance.
- The app cannot sync between multiple counties. You will need to upload all inspections/sync, delete any remaining inspections showing on the app, then download the facilities for the next county before disconnecting from Wi-Fi and heading into the field.

Tips and Tricks

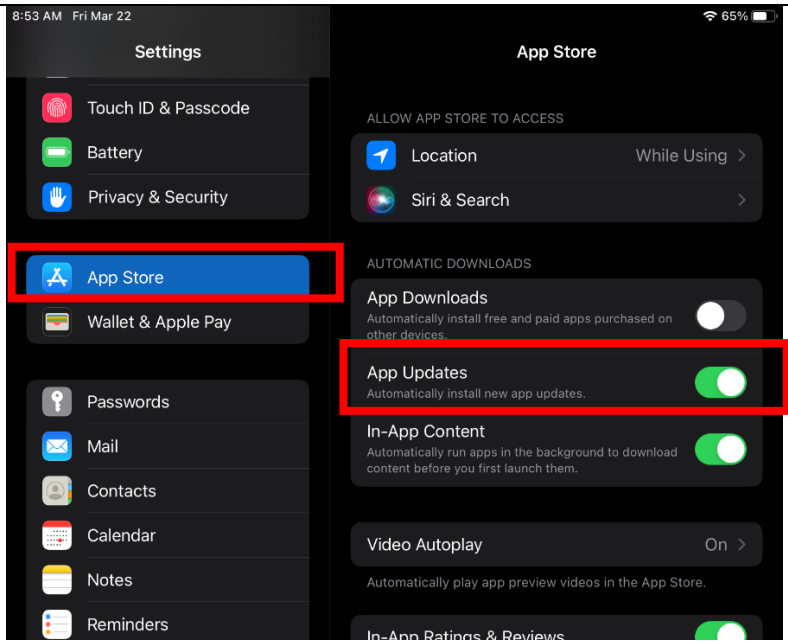
- Sometimes you might notice the keyboard will cover the area where you are trying to type. To 'shrink' your keyboard, anywhere on the keyboard you can pinch your fingers together in order to resize the keyboard. You can then move the keyboard anywhere on the screen. Additionally, the smaller keyboard allows for swiping to type. For more information see: https://support.apple.com/en-us/111789

Check App Store Settings

1. Find the Settings icon on your main screen and touch to open it:



2. Select App Store in the left pane, and make sure that the App Updates toggle on the right hand side is toggled on:



This will ensure that you will get any future improvements/updates to HSTouch.

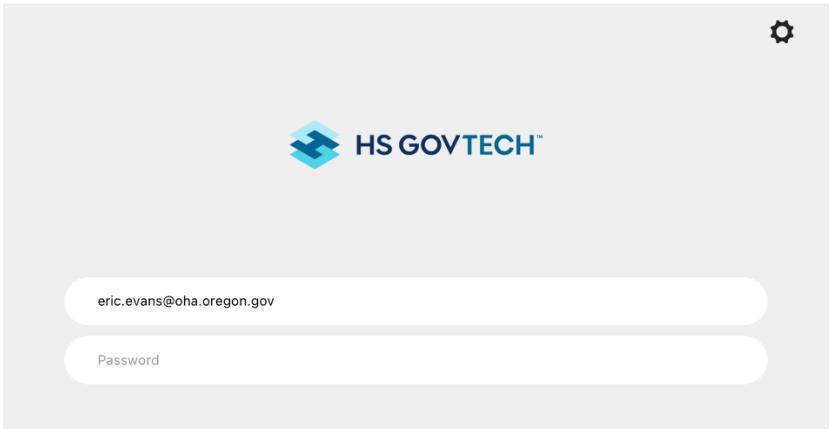
3. You may also want to go to Display & Brightness and change the Auto-Lock for the screen to be more than 2 minutes (10 minutes is more reasonable).
4. Drag your finger up from the bottom of the screen to go back to the main screen.

Logging in

1. On the device, find the HSTouch icon on the screen and press.



2. Enter your login credentials with assigned email address and password. Make sure the device is connected to the internet.

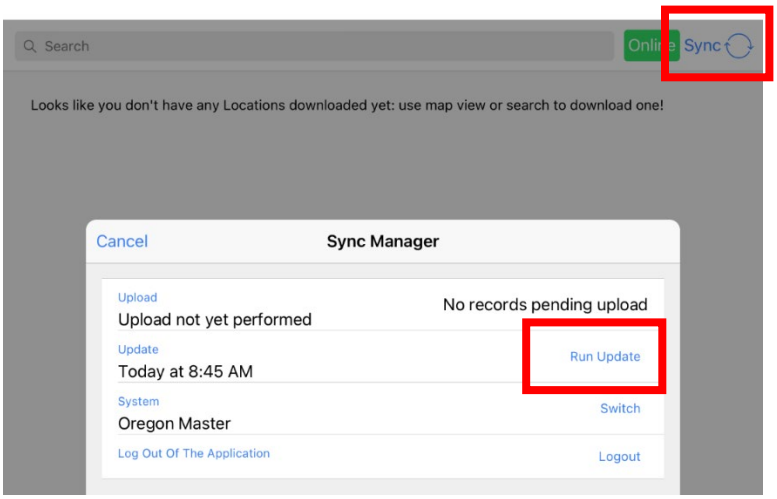


NOTE: Counties with multiple systems must use only one system at a time. The app cannot sync multiple systems.

NOTE: To change between systems (to view Master or another county in your jurisdiction), do NOT use the Switch button. It works better to close Touch and login again, selecting the other system of your choice instead.

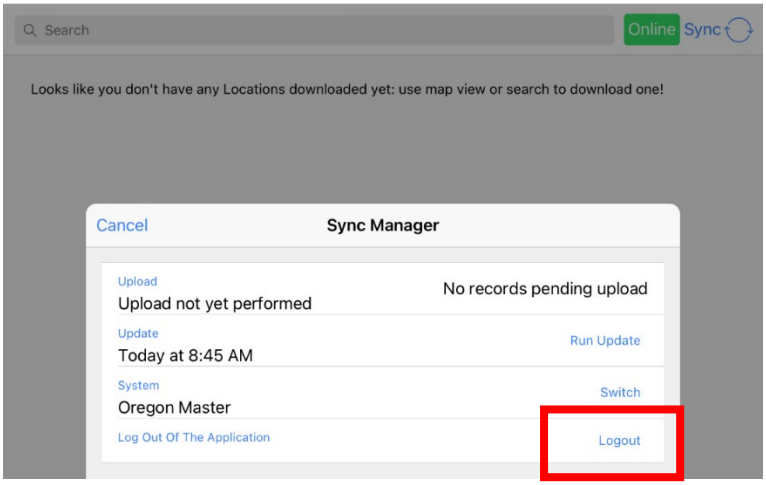
3. Press the Sync button and choose "Run Update" for updates to the system if needed. If the update date doesn't change, that that is fine and means that no update is needed. During the Sync and Update, the system will "Download schema" each time.

*****This should be done each day when you are opening the system*****



Logging out:

Press the Sync button and choose Logout at the bottom right of the list:

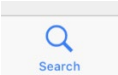


Selecting a Facility to be Inspected

While connected to the internet, the facilities to be inspected are downloaded to the device.

The steps to download the information are as follows:

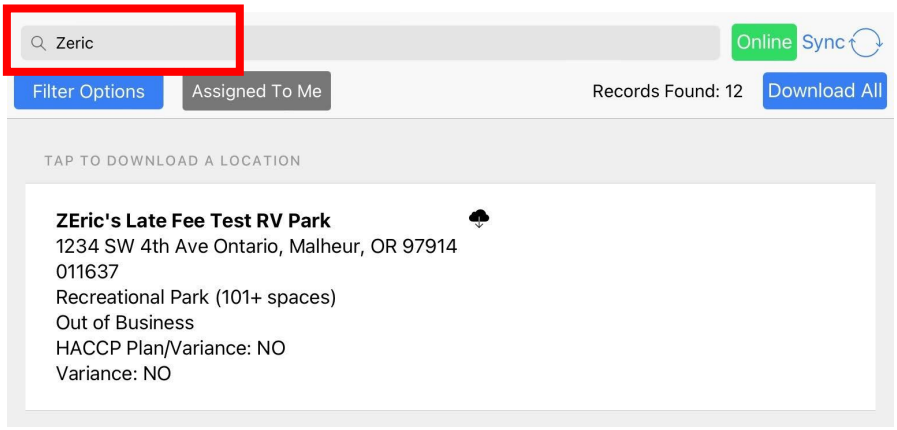
1) From the main screen, press the "Search" icon at the bottom right of the screen.



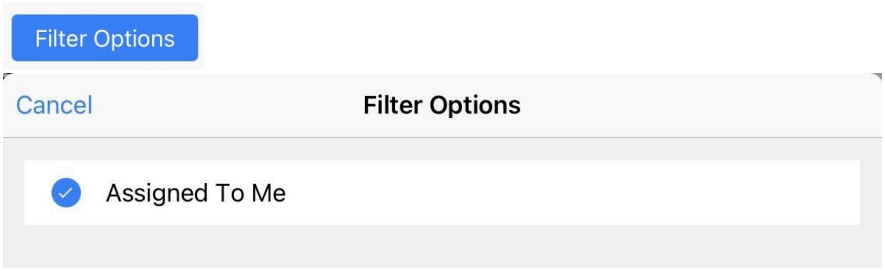
2) Next, you can search for a specific facility, or filter facilities which are assigned to you and download all facilities.

NOTE: The field is a "Full Text Search", and the use of "Wildcards" is permitted

i) Use the search bar to search for a specific facility (make sure the Assigned to Me option is not selected if you are looking for facilities not assigned to you, or they won't be in the search):



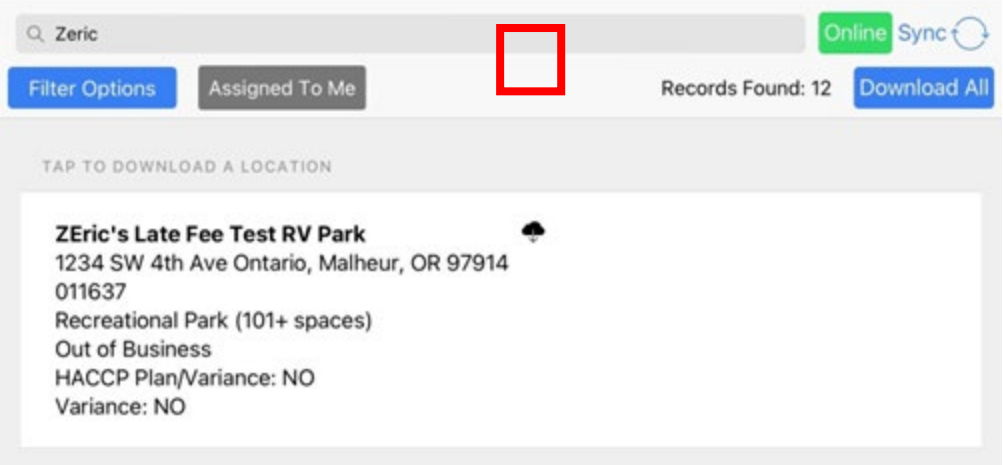
ii) Or use the Filter Options button to select Assigned to Me to see only the facilities assigned to you:



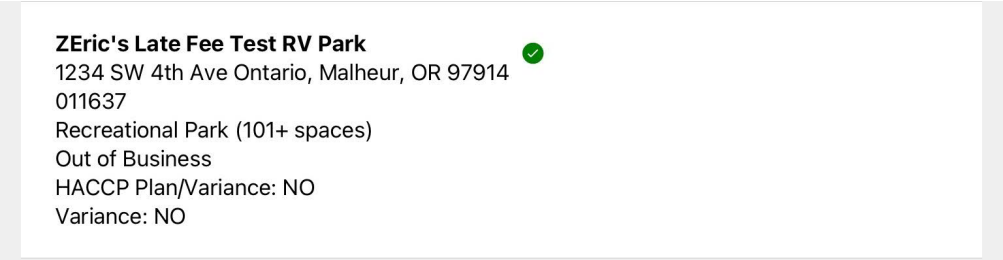
3) This will display all facilities containing the search criteria. Once you have the facilities that you are looking for, you can either:

a) Select facilities individually by tapping the cloud download icon on the right-hand side of the facility list.

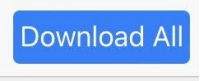




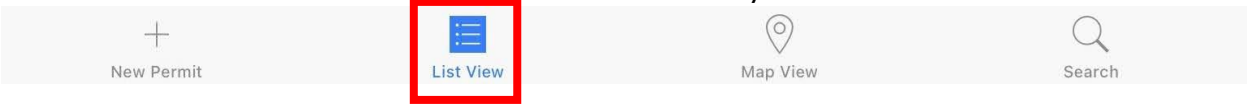
After download, the icon changes to a green circle with a checkmark.



b) Or you can select the Download All button to pull all the records at once:



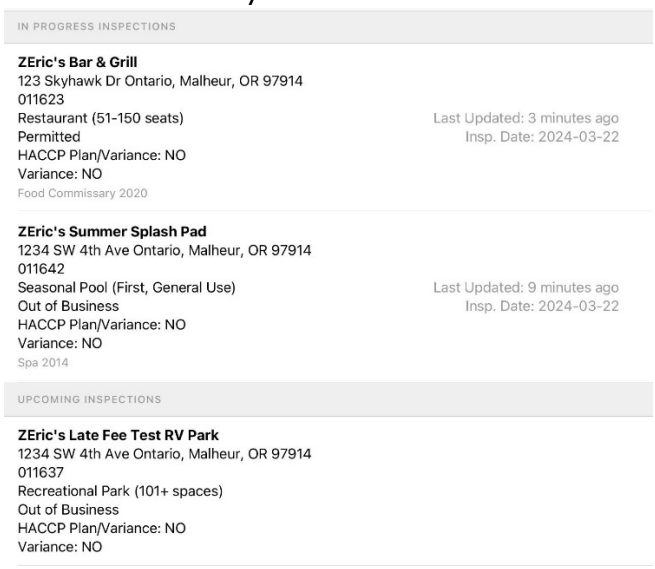
4) When you have finished downloading the facilities you want to carry on the app, tap "List View" at the bottom of the screen to see the facility or facilities downloaded.



5) The List View shows:

- Upcoming Inspections=newly downloaded facilities
- Pending Upload Inspections=finalized/complete inspections
- In Progress Inspections=inspections that have been started, but not completed/finalized yet

- Completed Inspections=inspections that have been uploaded from the app to the Cloud after an online sync

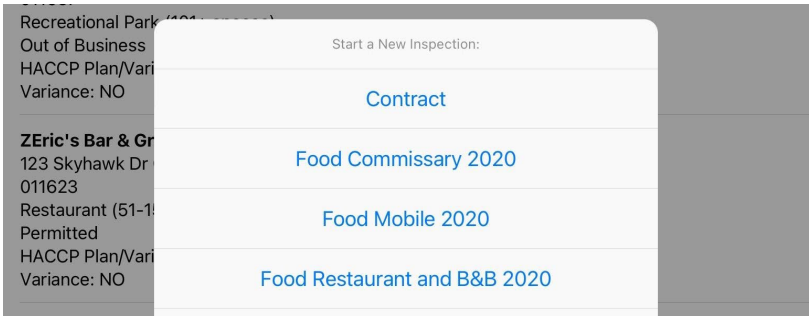


Completing an Inspection

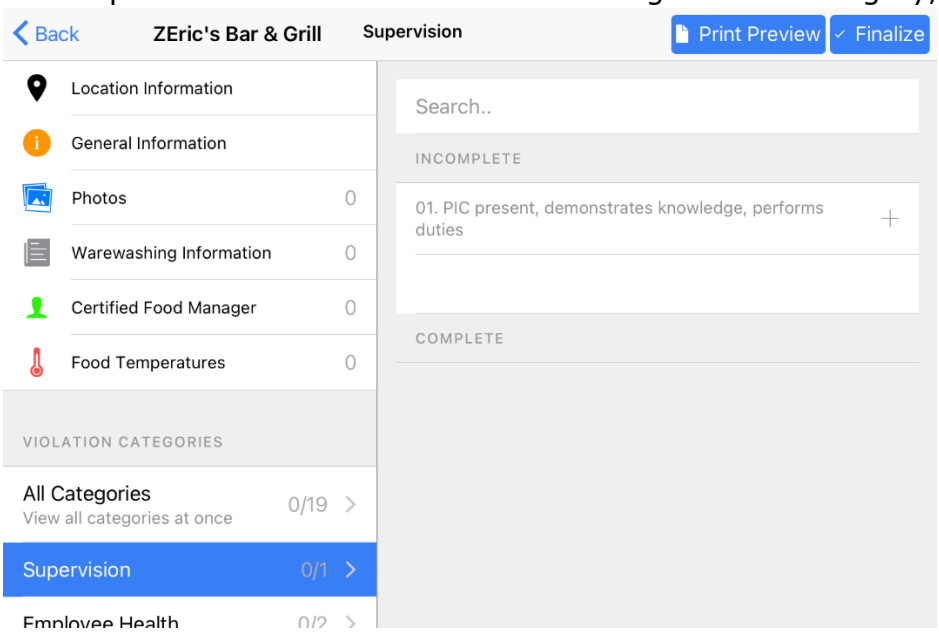
Once the facilities are listed as "Upcoming Inspections", the inspection can be done while connected or disconnected to the internet. While offline, some features of the iPad will not be available, such as Siri and the ability to send email.

To start the inspection:

1. From the List View, touch the name of the facility and choose the module/rule set.



2. The inspection screen will default to showing the first category, Supervision.

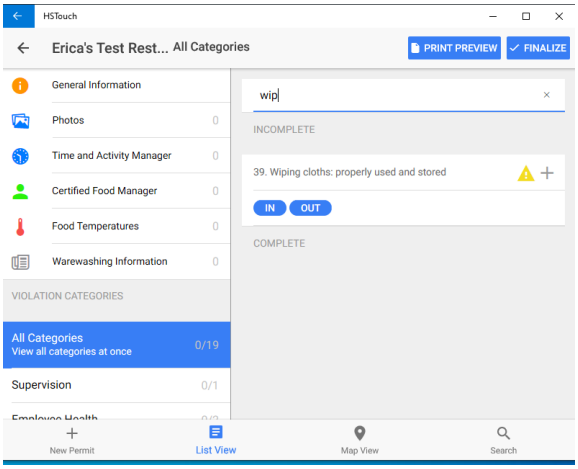


3. Click on All Categories before starting. This will show the entire "checklist", like the look/feel from CloudSuite.

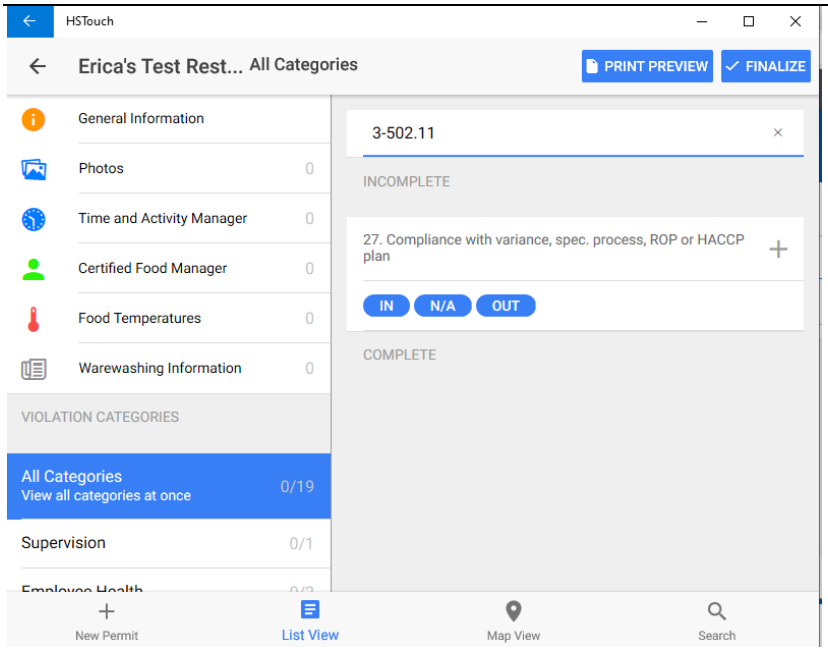
Searching for Violation Codes

Once you are seeing All Categories you will be able to use the Search function. You can search by both keywords and rule numbers.

Keyword searches work best when you put in small parts of words vs. writing out entire words (ex: "wip" vs "wiping cloth", or "hand" vs. "handwash"):



Violation searches also work with the whole number or parts of the rule:



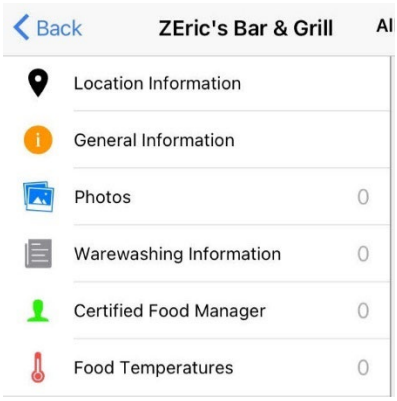
Completing the Violation Entry of the Inspection

Remember to use the Checklist Marking Instructions to ensure that you are correctly selecting IN, OUT, NA or NO for each category: https://www.oregon.gov/oha/PH/HEALTHYENVIRONMENTS/FOODSAFETY/REGULATORS/Documents/markinginstructions.pdf

1. It is usually most efficient to add all the OUT of compliance items to the inspection first and then go back and complete the checklist.
2. To mark a violation in the app:
    a. See violations using a category selection.
    b. For each violation number select an observation such as: OUT, IN, N/A or N/O as applicable.
    c. If OUT is selected, choose Corrected During Inspection or Repeat, if necessary
    d. If OUT is selected, choose the specific violation code from the screen.
    e. If OUT, add "canned comment" or type or "say" your own comment using the speech to text feature.
    f. Click Save to save the violation.
    g. If more than one violation code, press plus sign (from the search screen) and select OUT again and complete (only available in individual category view)



h. Fill out all mandatory fields in the top left menu choices. i.e., Inspection Date, Follow-up etc.

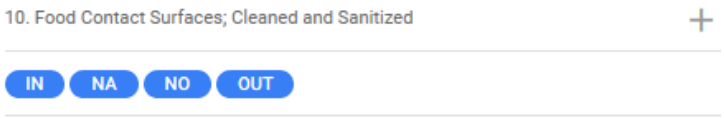


i. Preview the report.

Continuing with the inspection:

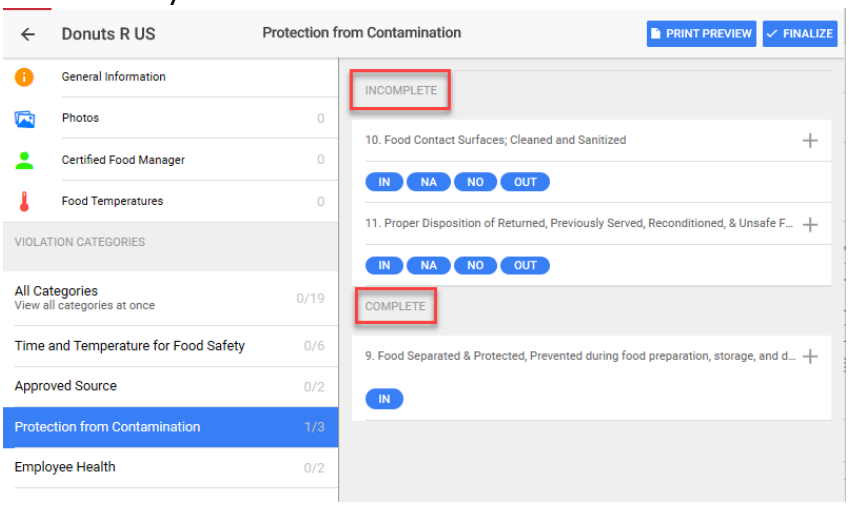
For this example, a single category has been selected.

1. To start, touch the button that shows the status of the violation category (Later the plus and arrow icons are used to edit a violation or select another violation in that number).

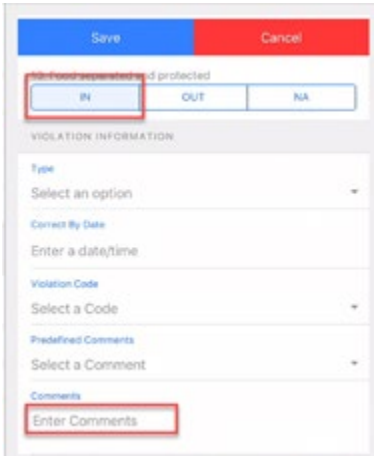


2. How to complete for an IN:

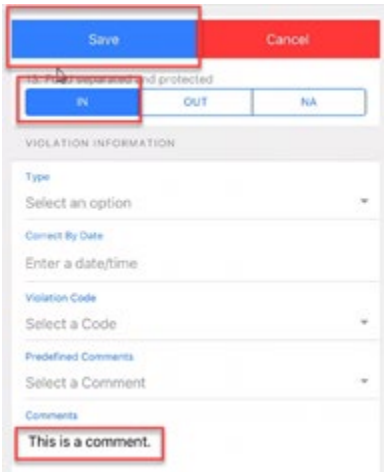
3. If the violation is marked IN, the default is to automatically save the IN. No further input is necessary.



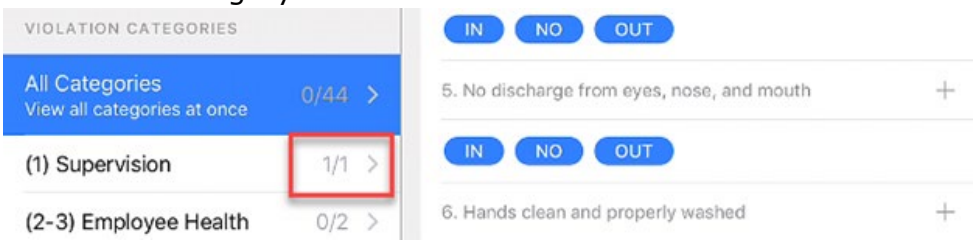
4. The system can also be set up to select an IN and type or select a predefined comment if needed. (Screenshots may vary)



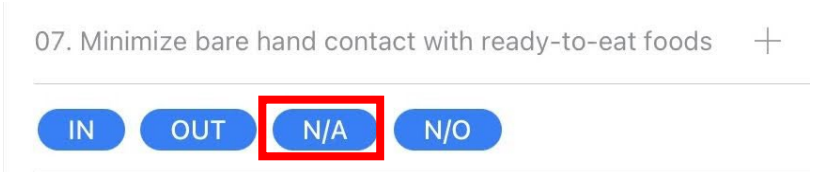
5. Select Save. This means any violation associated with this category number is IN.



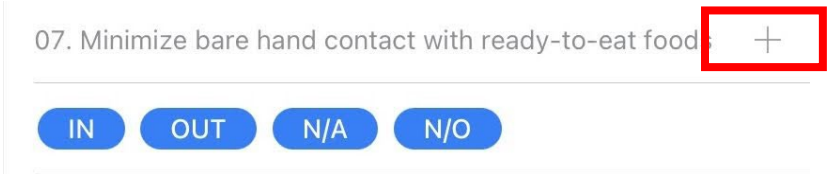
6. The next violation number in the category is displayed at the top. And the "count" is kept beside the category listed on the left-hand side:

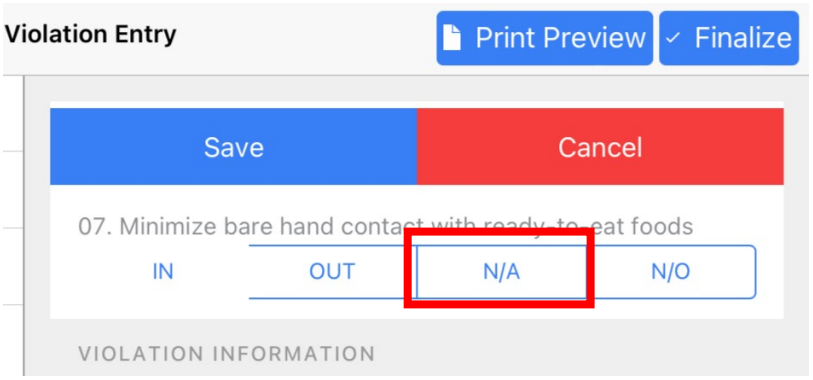


7. How to complete an N/A or N/O or another observation name that is not a violation:



or…

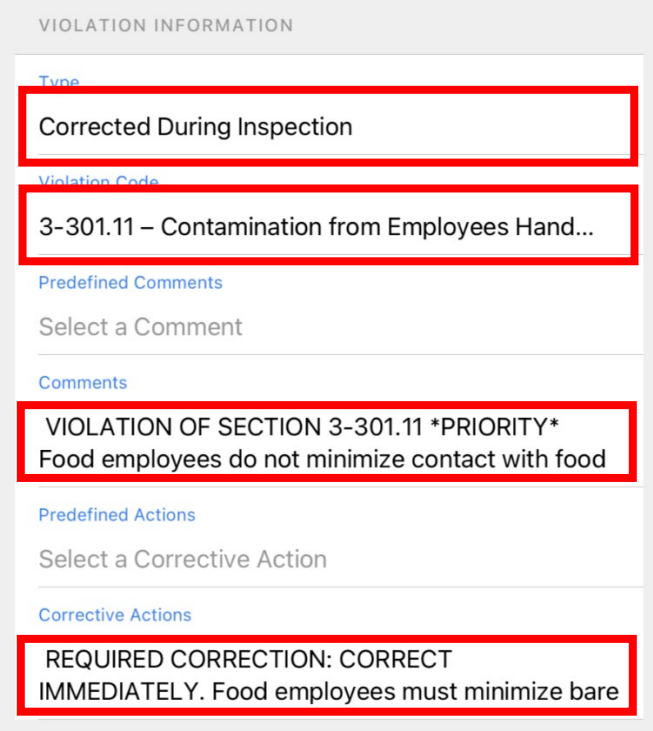


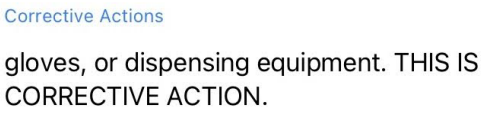


8. How to complete an OUT:
9. Select OUT.

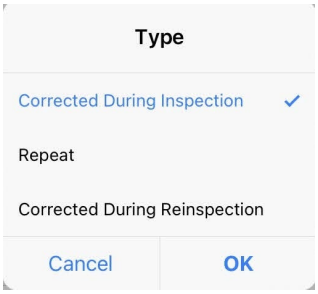


10. Fill out the Violation Information:





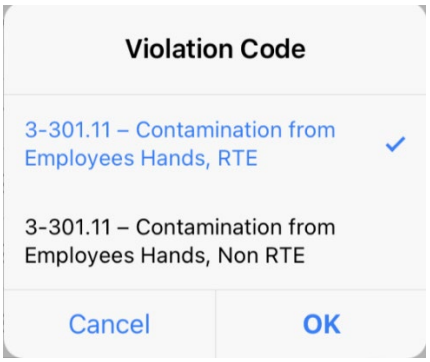
11. Select Corrected During Inspection or Repeat if that situation applies. Then touch OK.



12. Select a Violation Code by touching Select a Code.

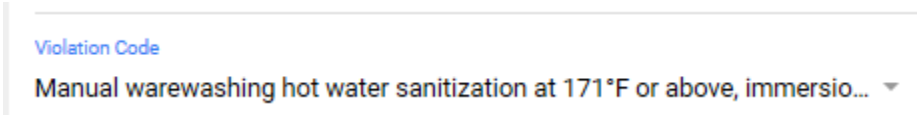


13. The Violation Code box is displayed with one or more Violation codes.

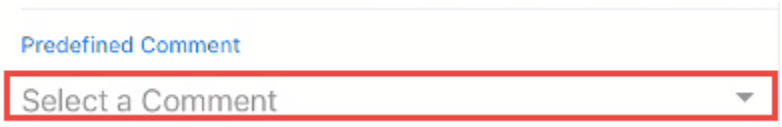


14. Select only one violation code. The code will be highlighted in blue. Press OK.

    Now some of the text of the violation is shown in the display.



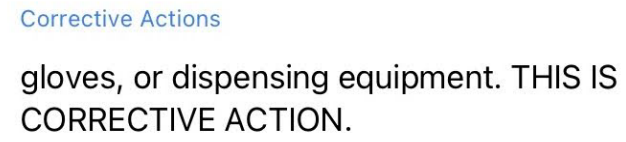
15. Make sure the correct code is displayed and then choose Select a Comment in Predefined Comment box if available.



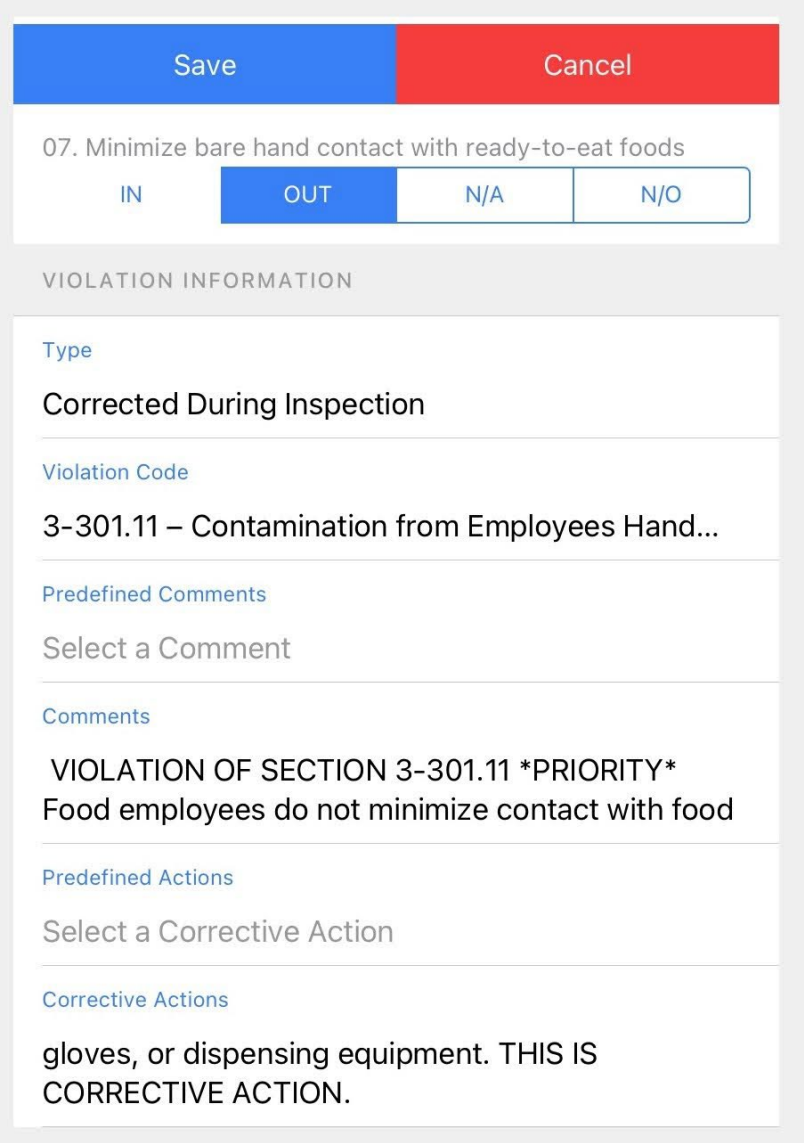
16. The Predefined Comments are displayed if this feature is being used. Tick one and press OK. The comment is displayed under Comments.



17. If you want, click on the box to edit the comment or press Cancel instead of OK and type or speak your own comment after tapping in the Comments box.



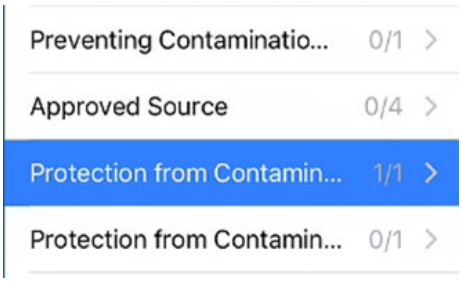
18. Click on Save to record the violation.



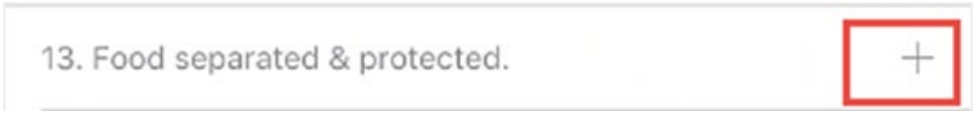
Selecting Additional Violation Codes from the Same Category

If more than one violation code from the same Violation Code must be entered:

1. Select the individual Category from the left side of the screen or scroll to the bottom of the screen to see the previously marked OUT of compliance violation.



2. Select the plus sign to the right of the Violation Code

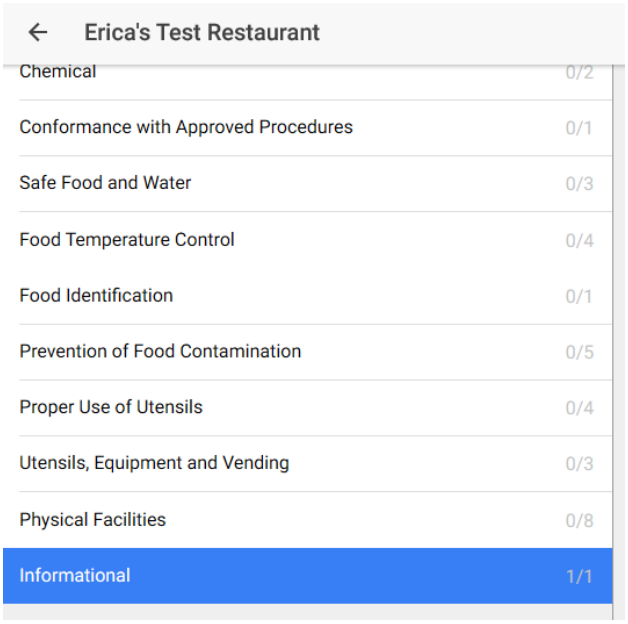


3. Repeat the steps to mark as OUT.

   NOTE: If an IN, OUT, NA or NO was marked and completed with errors or was saved before being correctly completed it cannot be easily undone in the All Category display.

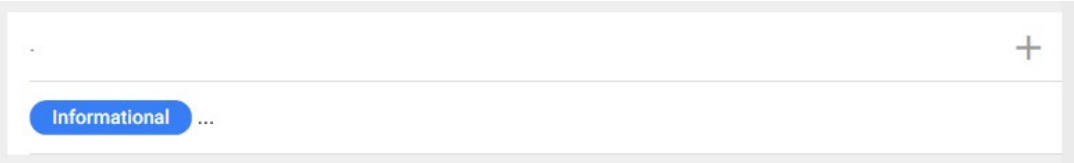
Adding or Modifying Canned Comments/99s/Informationals

The 99 "violations" are located at the bottom of the list of violations:

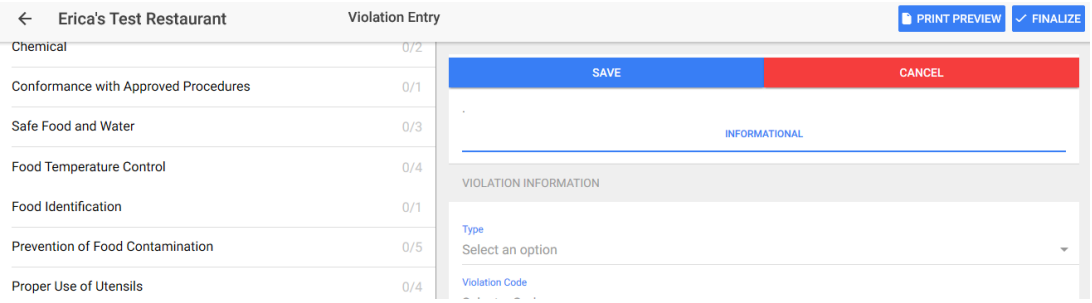


Click to add them just like any violation. There will not be any corrective actions available, but you can add personal text to each informational after the canned text/web links if necessary.

To add more Informational items, click the plus next to the existing Out of compliance:

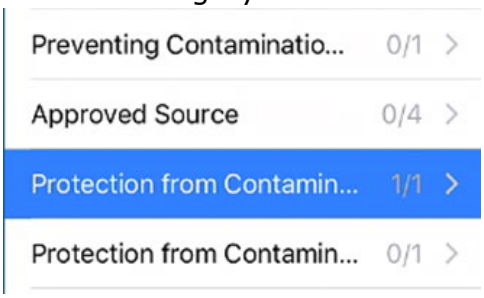


Click on the word Informational to turn it blue and then select Violation Code to add the next one:

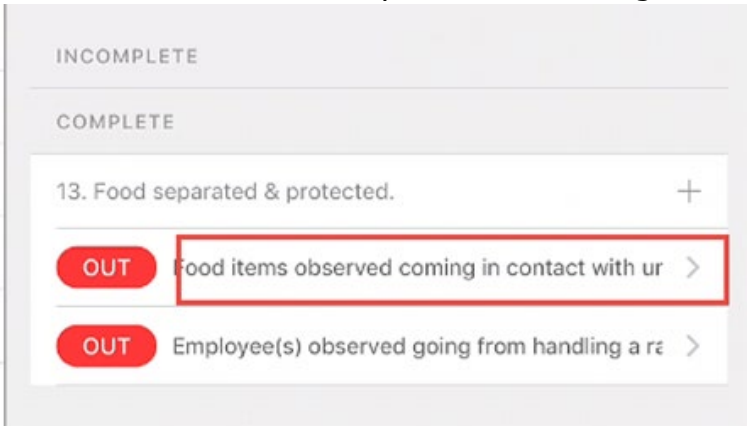


Editing or Modifying a Saved Violation

1. Pick the category from the side.



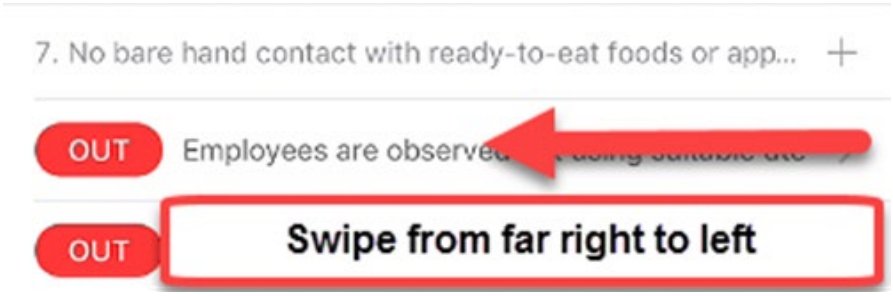
2. Press in the violation box you want to change: such as add a comment or fix a typo.



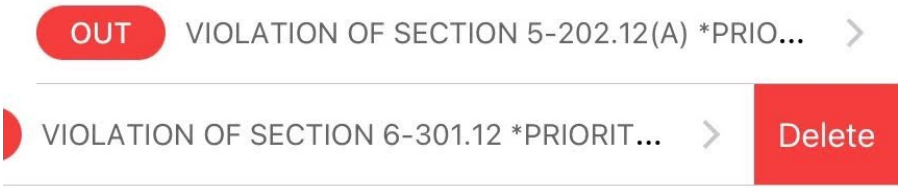
Deleting a Violation or Other Violation Record

1. To delete a violation, make sure to be in the individual Category display and then: SWIPE FROM THE RIGHT OF THE VIOLATION DISPLAY TO THE LEFT, TO SEE THE DELETE

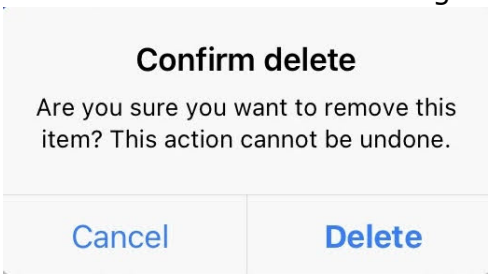
ICON.



2. Press on Delete.



3. Choose Delete from the dialog box or Cancel.



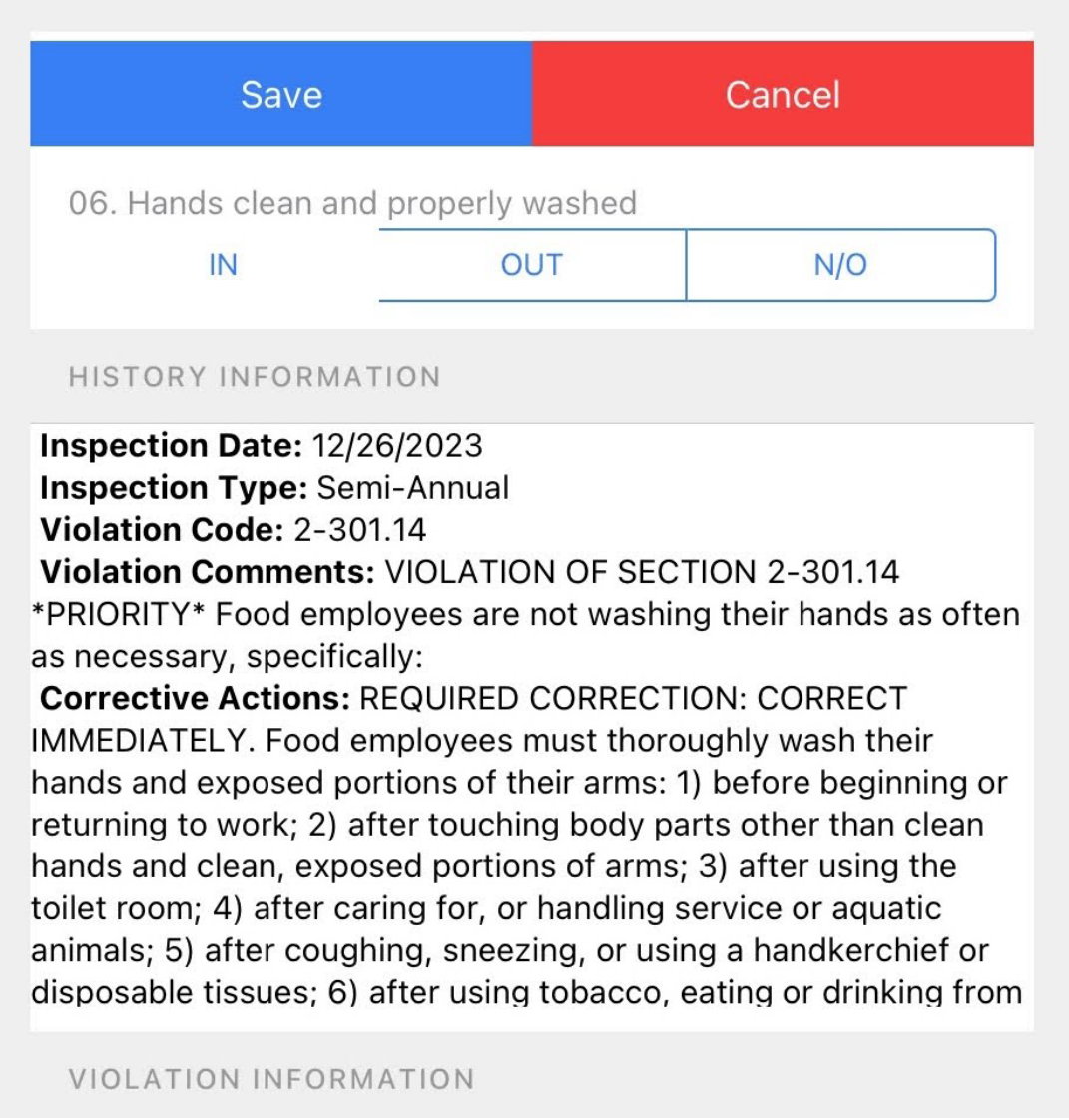
4. The category number must now be completed again.

Violation History and Repeat Violations

When a number is displayed, if there were violations in previous inspections, a history icon will be displayed.

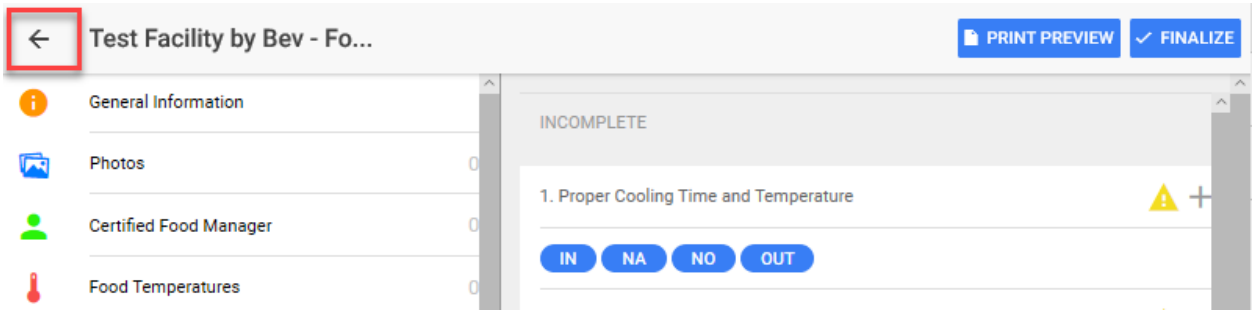


The newest will be displayed on top. This will help with deciding if the violation in question is a Repeat. This is another reason to make sure you have made complete comments to identify which violation should be cited as a repeat.

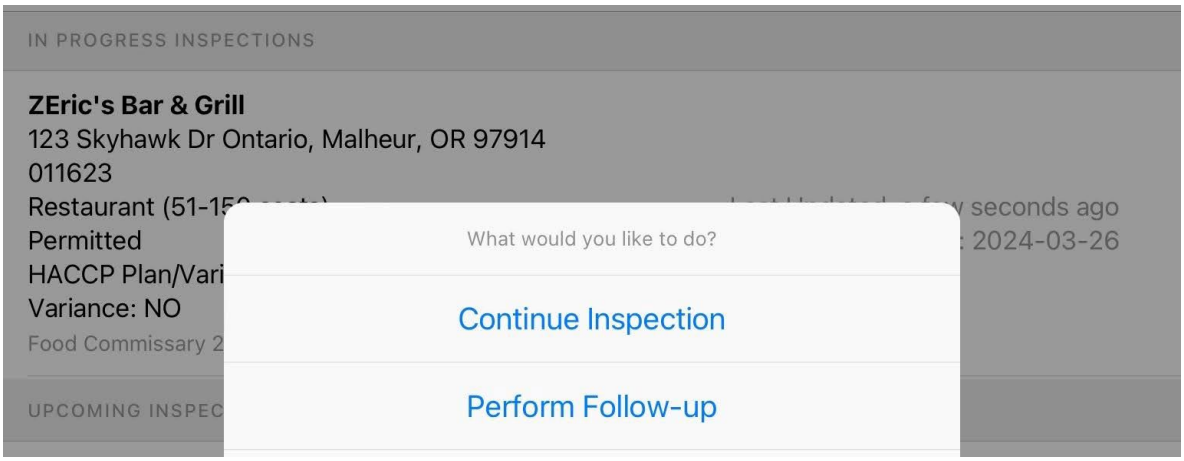


Exiting and Returning to an Inspection

1. At any time, touch the Back button to return to the List View (Facilities) from an inspection.



2. From the list, select the inspection and select Continue Inspection from the top of the menu.

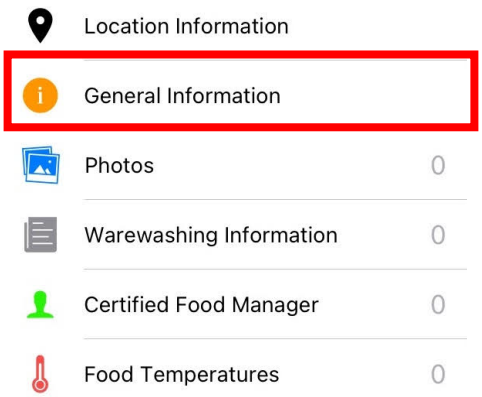


Completing the Other Menus

Samples of other menus are:

General Information is a client's custom inspection data fields and Photos is a default features; Warewashing; Food Temperatures and Equipment; and Time Reports are all examples of compiling lists of data called Child Tabs. (This is to show the functionality. All of these are custom designed for clients)

- ***General Info (examples)***

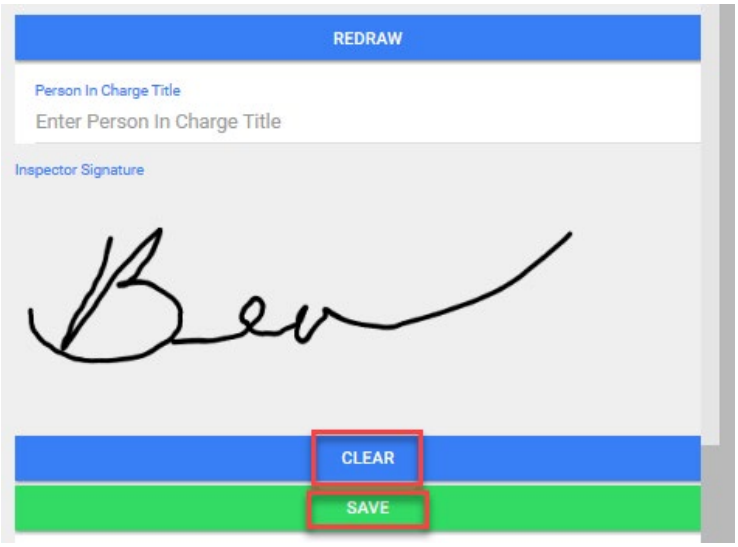


  - Inspection date (required):
    - Select a date from the calendar, move to next choice. Data is saved.
  - Inspector (required):
    - Select the Inspectors name from the dropdown list.
  - Purpose:
    - Select the inspection type (i.e., Semi-Annual) from the dropdown list.
  - # of Certified Food Manager:
    - Input the number of certified food managers.
  - Total # of Food Managers:
    - Input the total number of food managers.
  - # of Certified Food Handlers:
    - Input the number of certified food handlers.
  - Total # of Food Handlers:
    - Input the total number of food handlers.
  - Inspection Outcome (required):
    - Select the appropriate response from the dropdown menu.
  - Reinspection Required (required):
    - Select "Yes" or "No" from the dropdown menu.

- Reinspection Date:
  - This field should auto populate once "Yes" is selected in the Reinspection Required field.
- Comments:
  - Enter any general inspection comments here.
- Person in Charge:
  - Enter the name of the Person In Charge.
- PIC Signature:
  - PIC should sign the inspection here. HAVE THE PIC SIGN FIRST AND SAVE **BEFORE** THE INSPECTOR SIGNS.



  - THE SIGNATURE MUST BE **SAVED** WITH THE SAVE BUTTON. Otherwise, will have to be re-entered.
- Person in Charge Title
  - Type the PIC's title within the business.
- Inspector Signature:



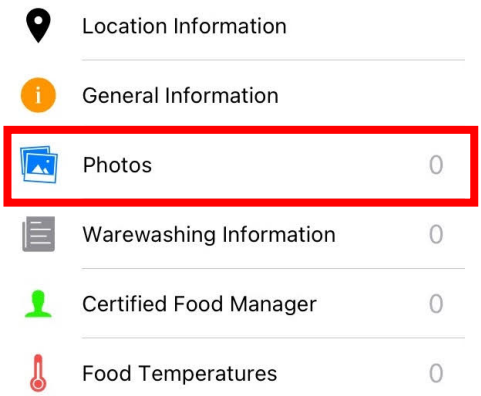
- Sign your name. THE SIGNATURE MUST BE **SAVED** WITH THE SAVE BUTTON. Otherwise, will have to be re-entered.

- NOTE: The signatures can be redrawn after saving, before finalizing the inspection.



- Score:
  - This auto populates when the violations are added.
- Time In and Time Out
  - Enter the time in and time out of the facility.
- Miles Travelled:
  - Enter the miles travelled if applicable.
- Travel Time:
  - Enter the travel time if applicable.

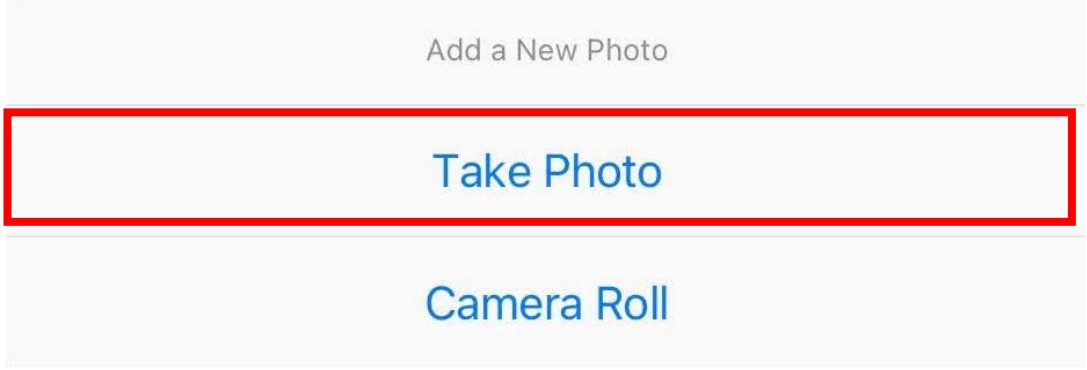
- ***Photos***
  - Touch or click on Photos:



  - Add with:



Select "Take Photo" (for Take Photo, access to the camera must be given) or "Camera Roll" (for Camera Roll, access to Photos must be given).



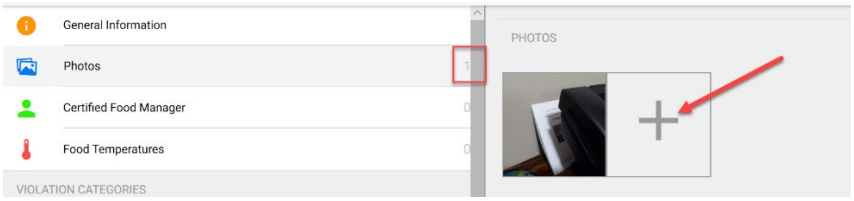
For "Take Photo", take the picture and either "Retake" or "Use Photo".



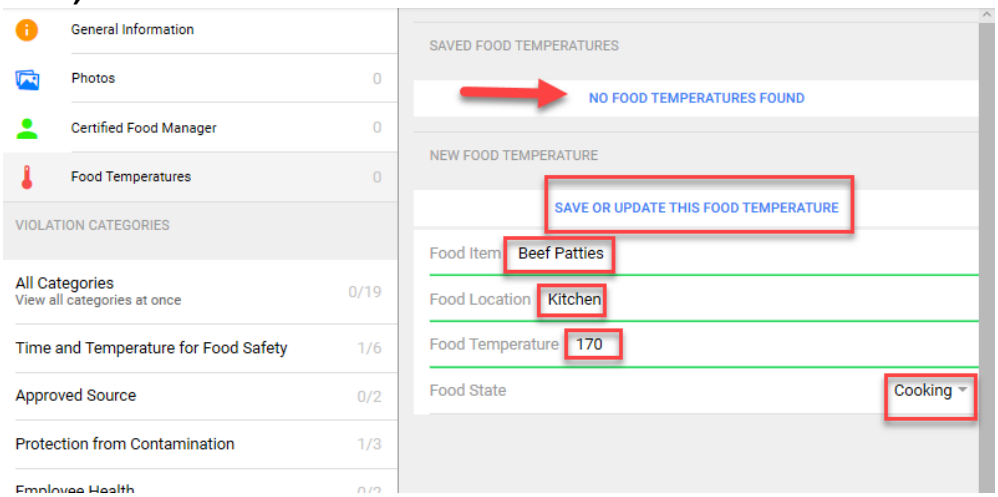


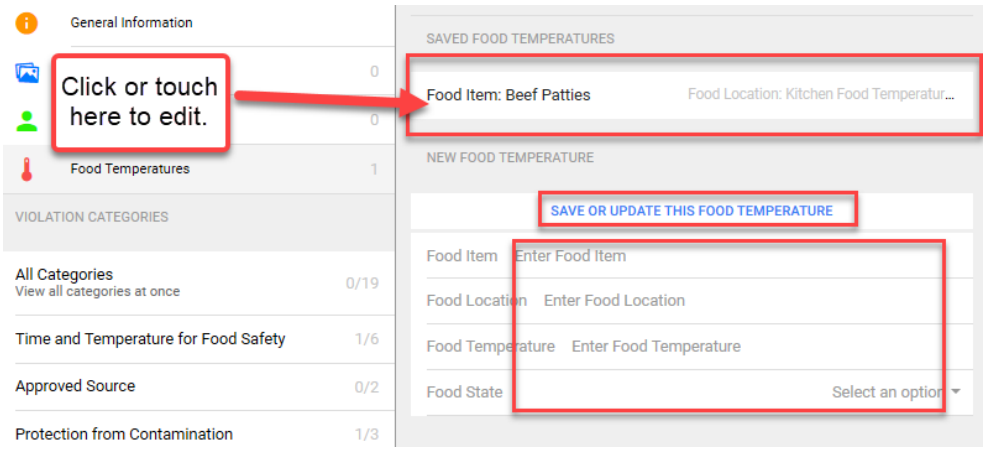
Save to your device.

The Photo will be added, and you can click the plus sign to add more.



- ***Warewashing Information, Certified Food Manager, Food Temperatures, Pool data, etc.***

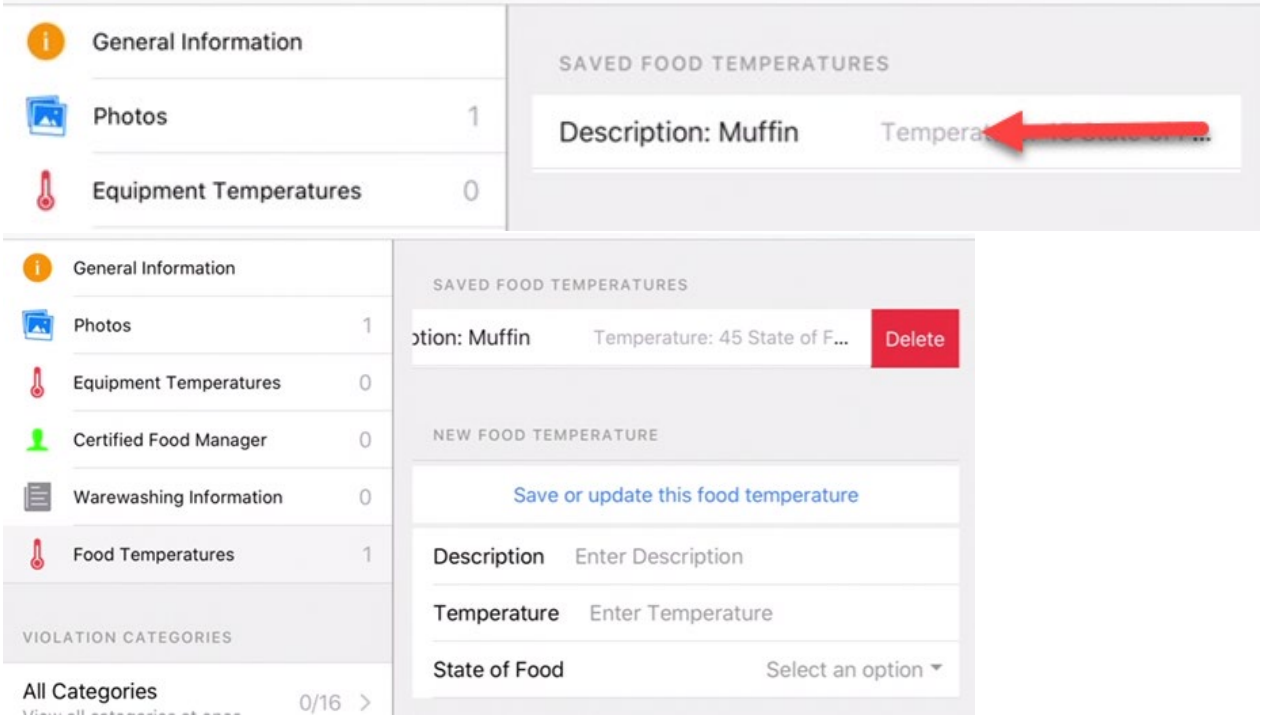




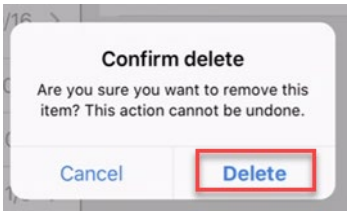
Type or "Say" to complete the form and touch "Save or update this ...." button.

- Only enter the number value for a temperature (ex: 41), do not enter the degrees F as the system will do that automatically.
- The form must be saved to be entered and is displayed near the top of the page.
- Add additional records and save each one ("Save or update this ....").

At any time, you may delete a record by swiping from the left and touch Delete:



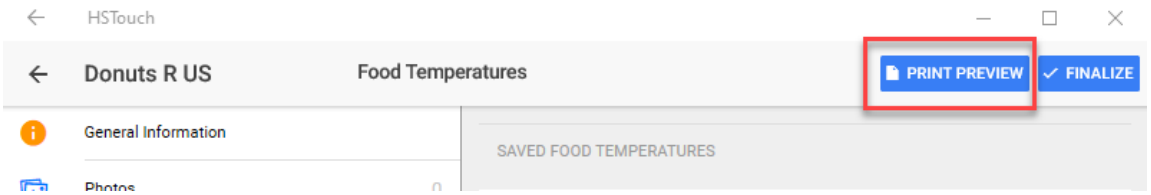
Confirm Delete to remove the record:



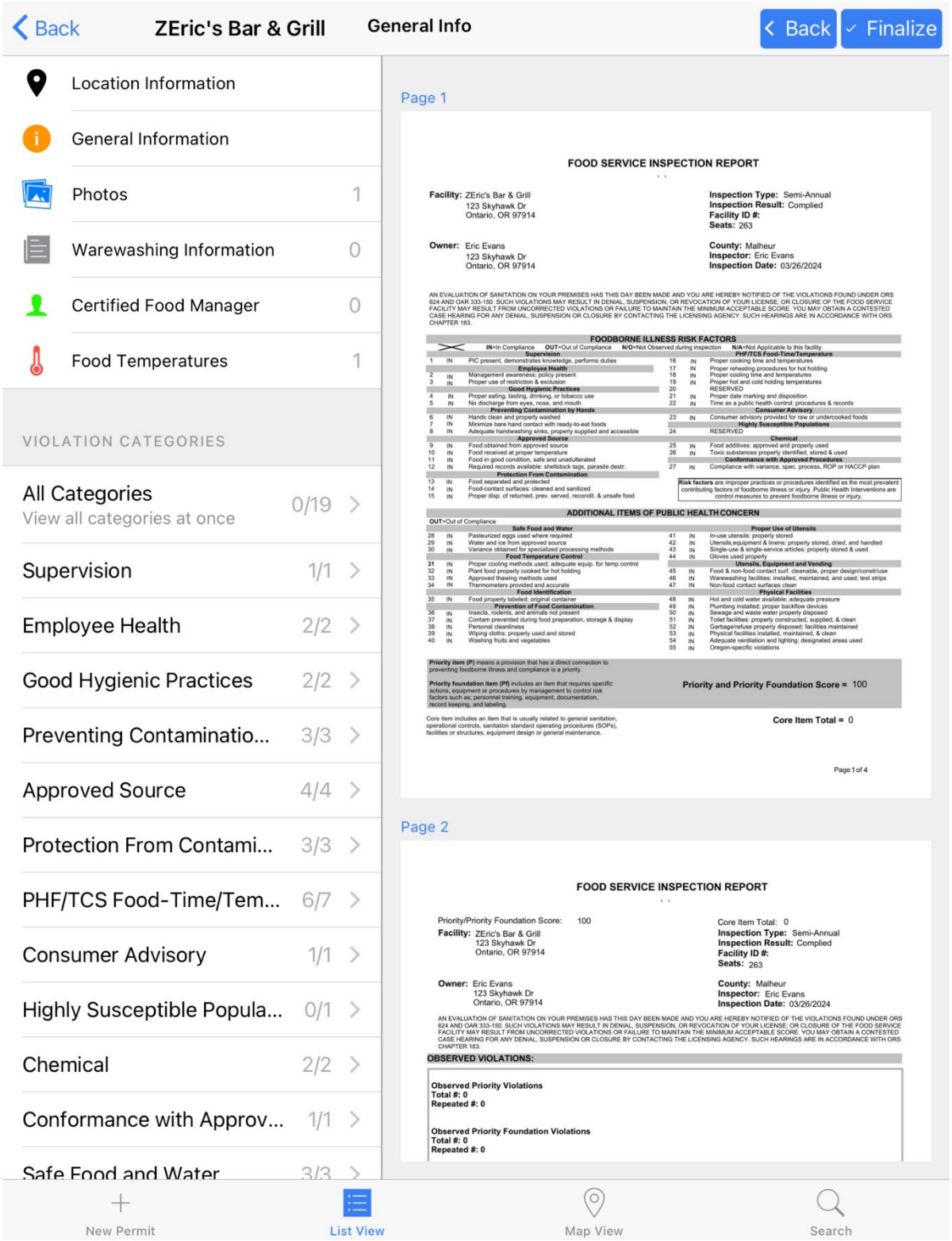
Previewing the Print Report

The printed report can be viewed at any time during the inspection. It is a good idea to preview to make sure that all information has been entered correctly. The form is static so the Violations display will overflow to a separate new page if too numerous to fit in the allowed space.

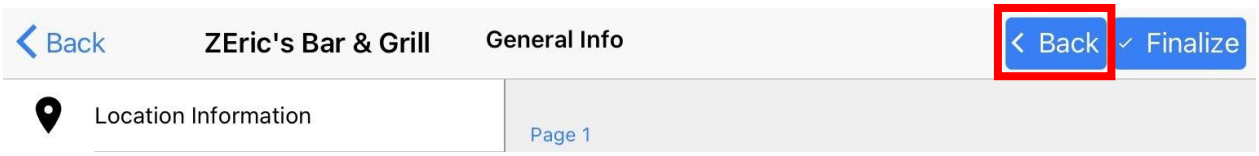
1. Touch on the Print Preview button at the top right of the screen.



2. Scroll through the pages of the report.



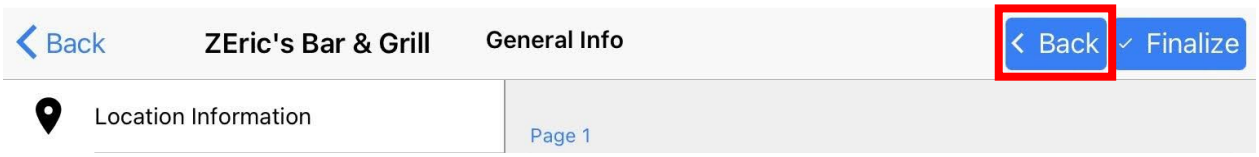
3. Use the blue Back button to return to the inspection entry to make any corrections while viewing the Print Report.



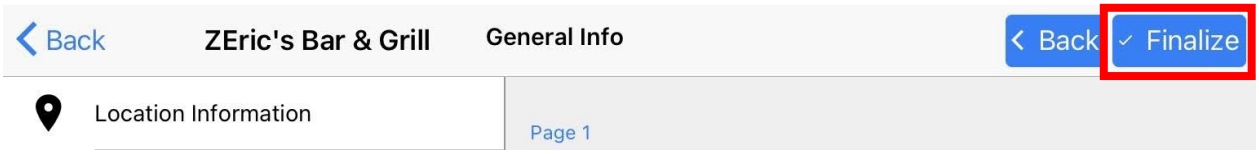
Finalizing, Uploading and Emailing the Inspection Report

Once the Printed Report is deemed complete, the inspection is finalized for emailing and syncing of the data to HealthSpace Cloud.

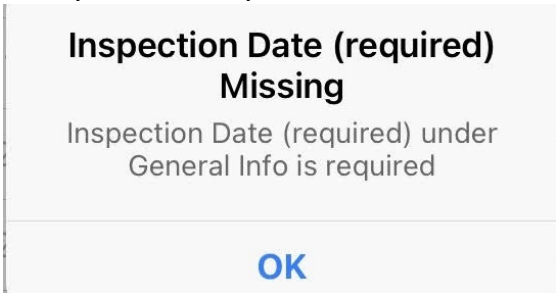
1. Press the Back button to return to inspection entry view.



2. Press "Finalize" at the top right side of the screen.

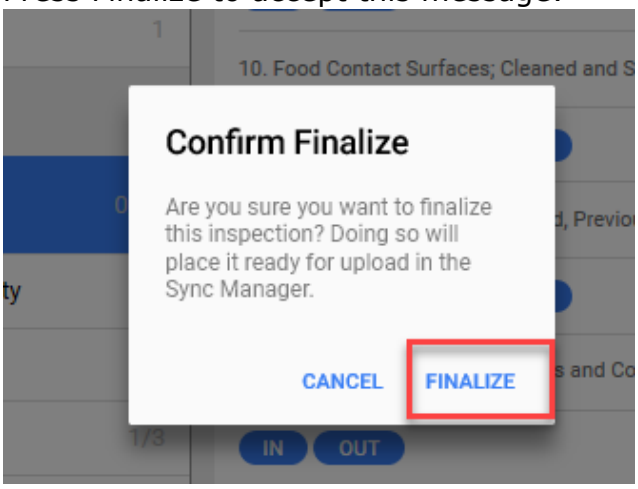


3. If any mandatory fields have not been completed a message will appear.

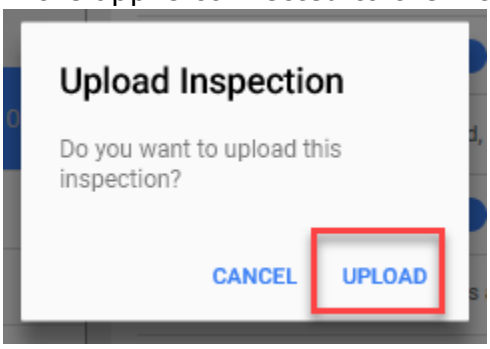


Make any edits necessary and try again.

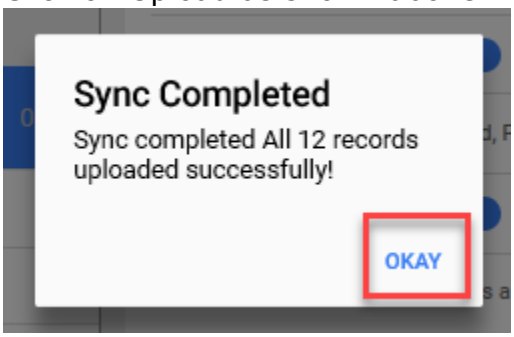
4. Press Finalize to accept this message:



5. If the app is connected to the internet, this message will appear:

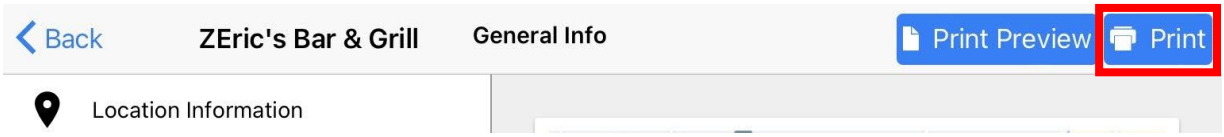


6. Click on Upload as shown above. The Sync Completed prompt is displayed. Click OK.

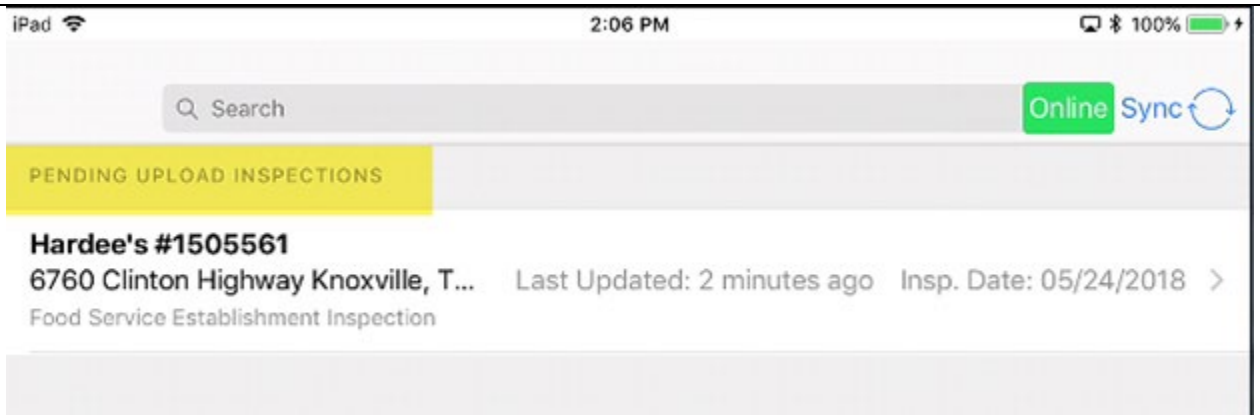


*NOTE: The number of records that sync does **not** equal the number of inspections. It is also uploading background data, etc.*

7. The screen remains the same except for the button that was "Finalize" is now showing "Print".

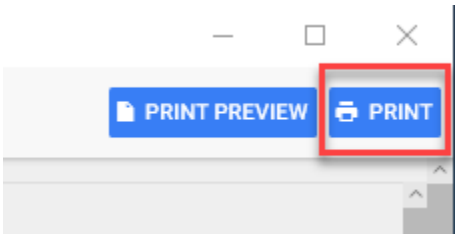


If the inspection was exited at this point, by selecting Cancel, the record now shows under the heading "PENDING UPLOAD INSPECTIONS" on the List View. (Screenshot may vary)

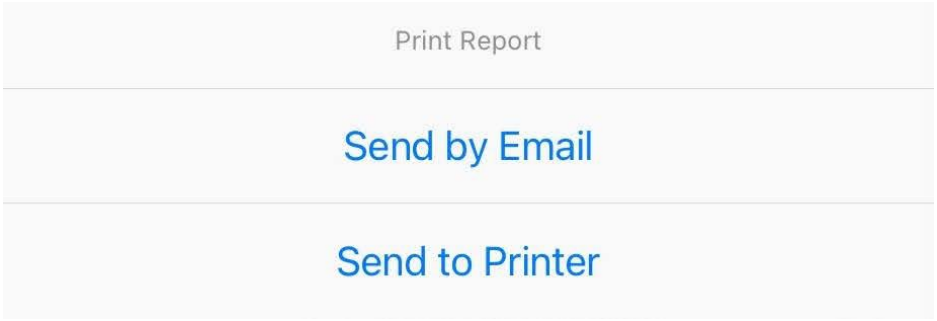


If you are connected to the internet and selected Upload, you can now send emails of the report.

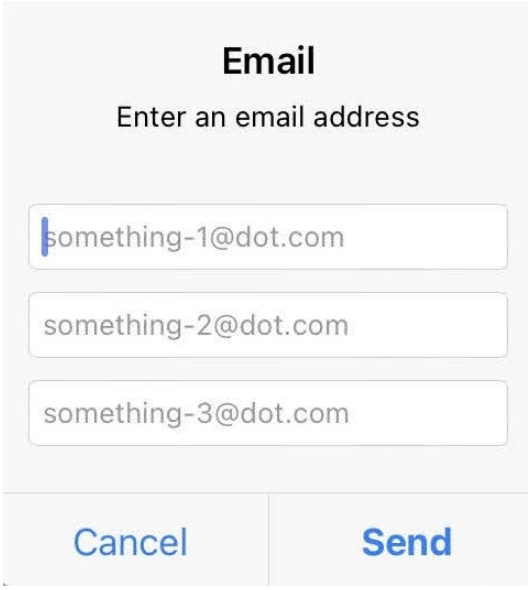
8. Press the Print button to email or print.



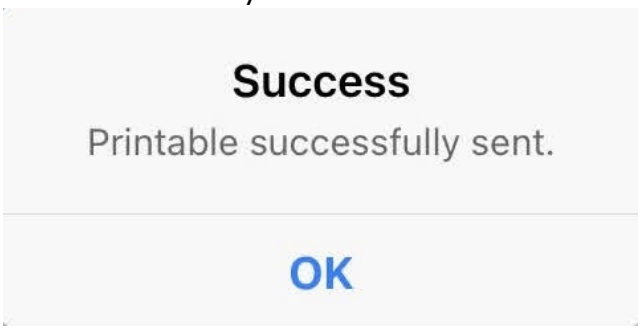
9. Select "Send by Email".



10. Fill in up to 3 email addresses and press the Send button.

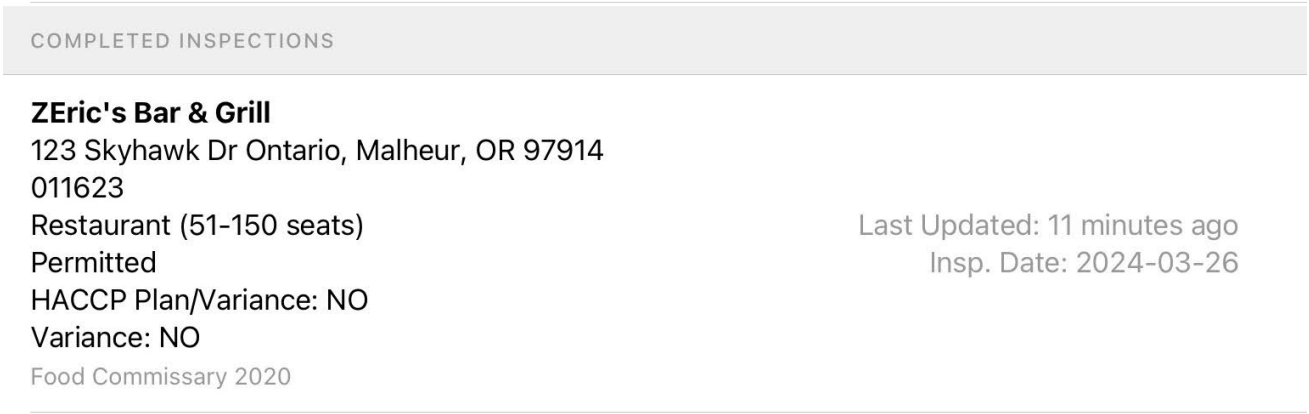


11. The progress of the email is displayed and then a message is shown that the email has been successfully sent. Click on OK.



If you didn't send it to yourself, do it now. If the data is deleted before it is properly uploaded to the Cloud, the data will no longer be stored in the device.

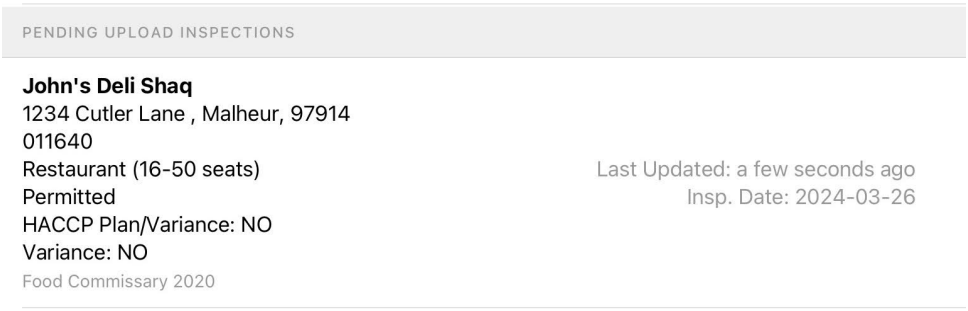
12. Press the Back arrow, to go back to the List View.



Note that the facility is under the heading "COMPLETED INSPECTIONS".

Uploading Data to HealthSpace Cloud from the Sync Center

The Sync Manager menu is used to upload the inspections, that were left not uploaded at the time of finalizing, to the Cloud.

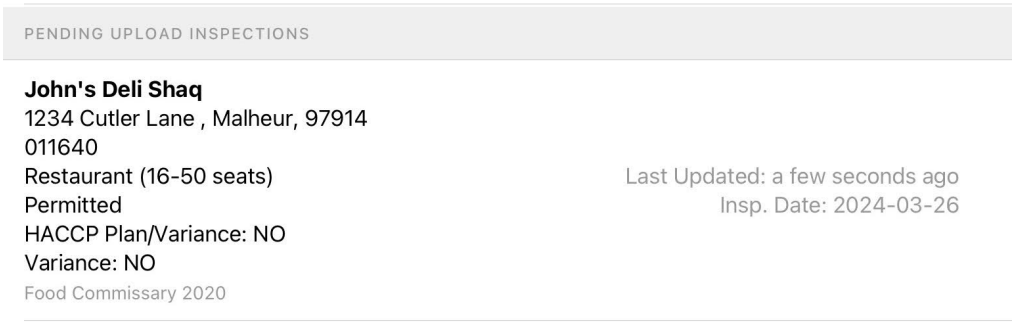


Once the data has been sent to the server successfully, the Facility record can be removed from the COMPLETED INSPECTIONS list (Not shown). It is important to ensure that, in fact, the data has synced with the Cloud by paying attention to any messages on the HSTouch screen during upload.

We recommend uploading inspections one at a time in case there are any issues, or the Wi-Fi connection is weak. If an upload is unsuccessful because of User error, the report can be edited to make the corrections and then re-uploaded.

To send data to the HS Cloud using the Sync Manager:

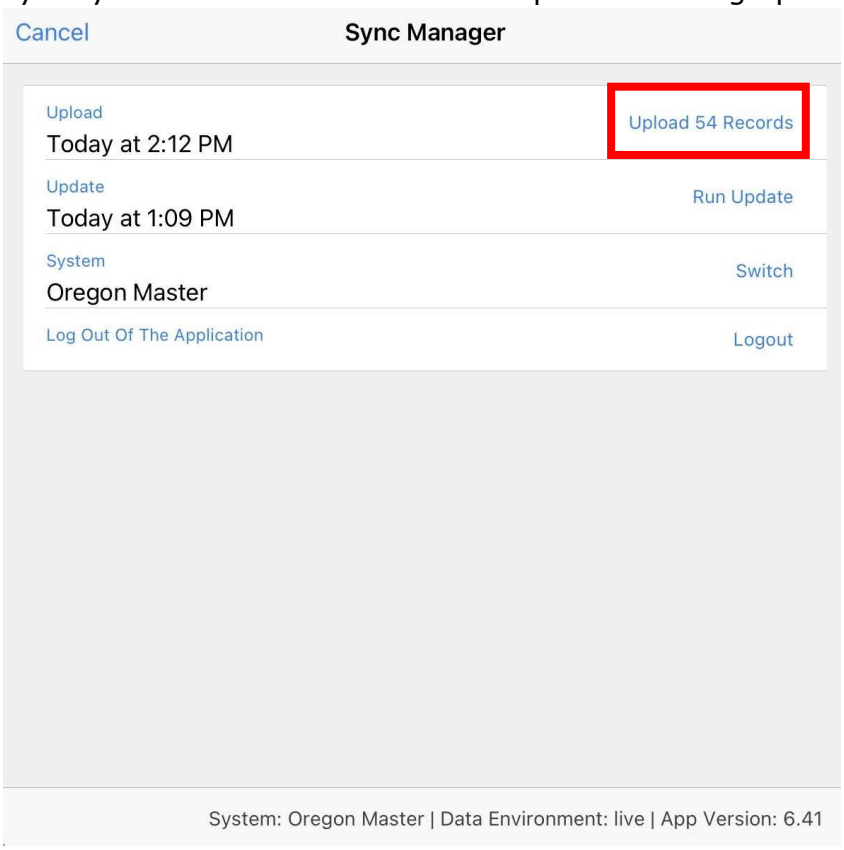
1. Make sure the PENDING UPLOAD INSPECTIONS are visible in the List View. This shows which records have or will be sent to the server.



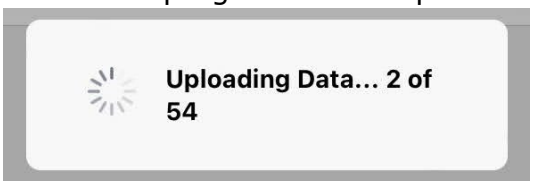
2. Press the Sync menu.



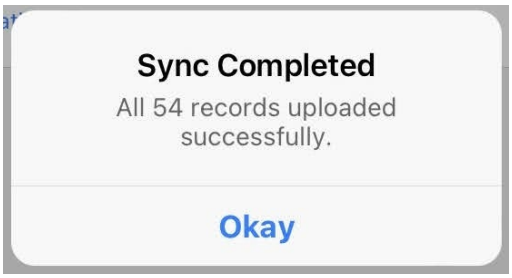
3. Select "Upload xx Records" from the menu. NOTE: The number of records is not synonymous with the number of inspections being uploaded.



4. Watch the progress of the upload.

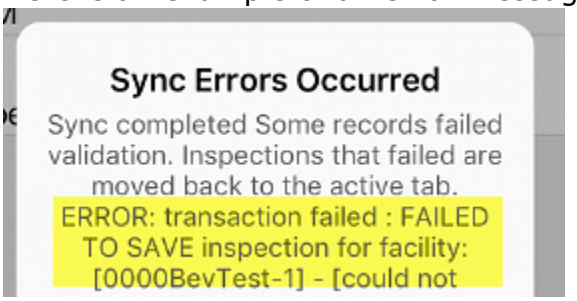


5. Look for this message:
   Sync completed All XX records uploaded successfully!

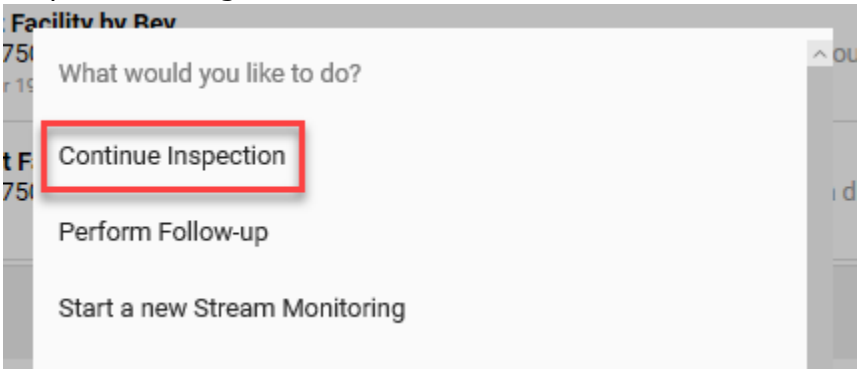


Correcting Data Input Errors

Here is an example of an error message due to user error.



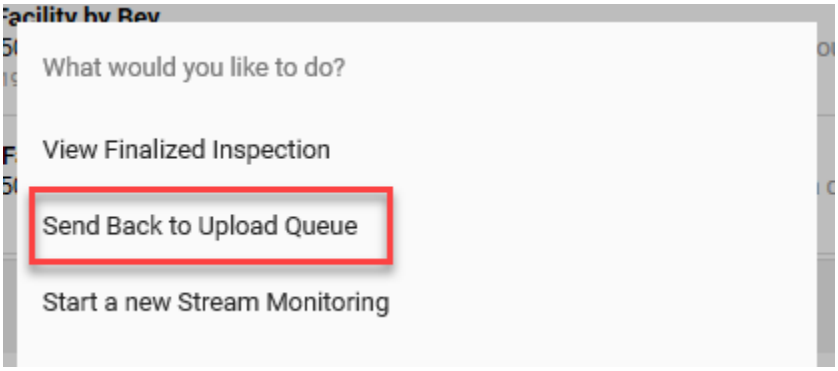
1. If you see anything else other than the successful response, the data will not be uploaded. TAKE NOTE OF THE ERROR AND FOR WHICH FACILITY; CORRECT THE ERROR AND RETRY. If the message is a system error, contact Eric or Erica.
   Please take a screenshot of the error to include with your message*
2. Select the facility in the List View, 'IN PROGRESS INSPECTIONS', and choose "Continue Inspection" to get back in to make corrections.



3. Repeat from Finalize to the Upload procedure until it is successfully uploaded to the Cloud.

Resending Inspections from HSTouch to the Cloud

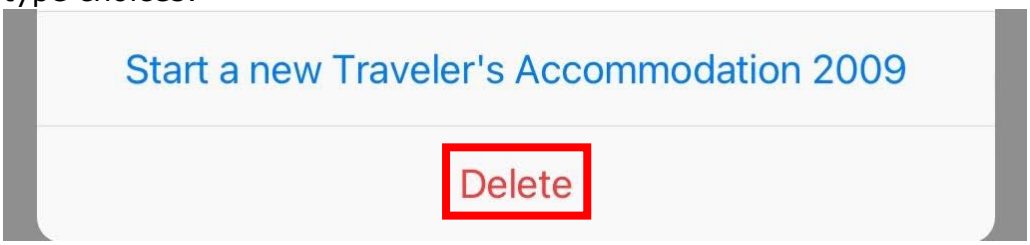
This should not be necessary, but if you are sure the inspection did not sync to HealthSpace Cloud, you can:



Removing Records from HS Touch

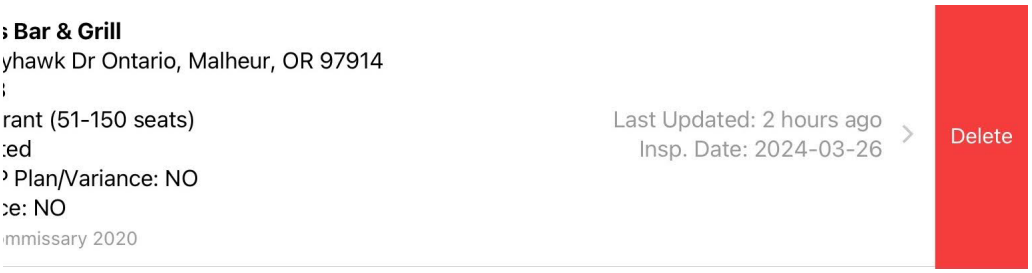
After the Completed Inspections have been uploaded, they remain in the COMPLETED INSPECTIONS list (the screen may need to be refreshed to see this) until removed. If more records are added to the COMPLETED INSPECTIONS, the previously uploaded records **will not** upload a second time. Any record can be removed from the List View screen this way.

1. Touch the inspection in the list and select Delete from the very bottom of the inspection type choices:



OR

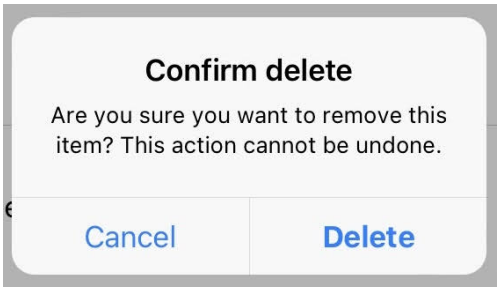
Swipe from the right to the left and select Delete:



2. Touch the Delete button. For both methods, this message is displayed:

   Note: THIS ACTION CANNOT BE UNDONE!

3. Touch the Delete button to delete the Inspection or location record.



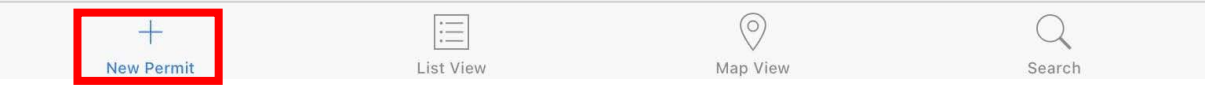
Note: THIS ACTION CANNOT BE UNDONE!

Creating an Inspection for an Unlicensed Facility

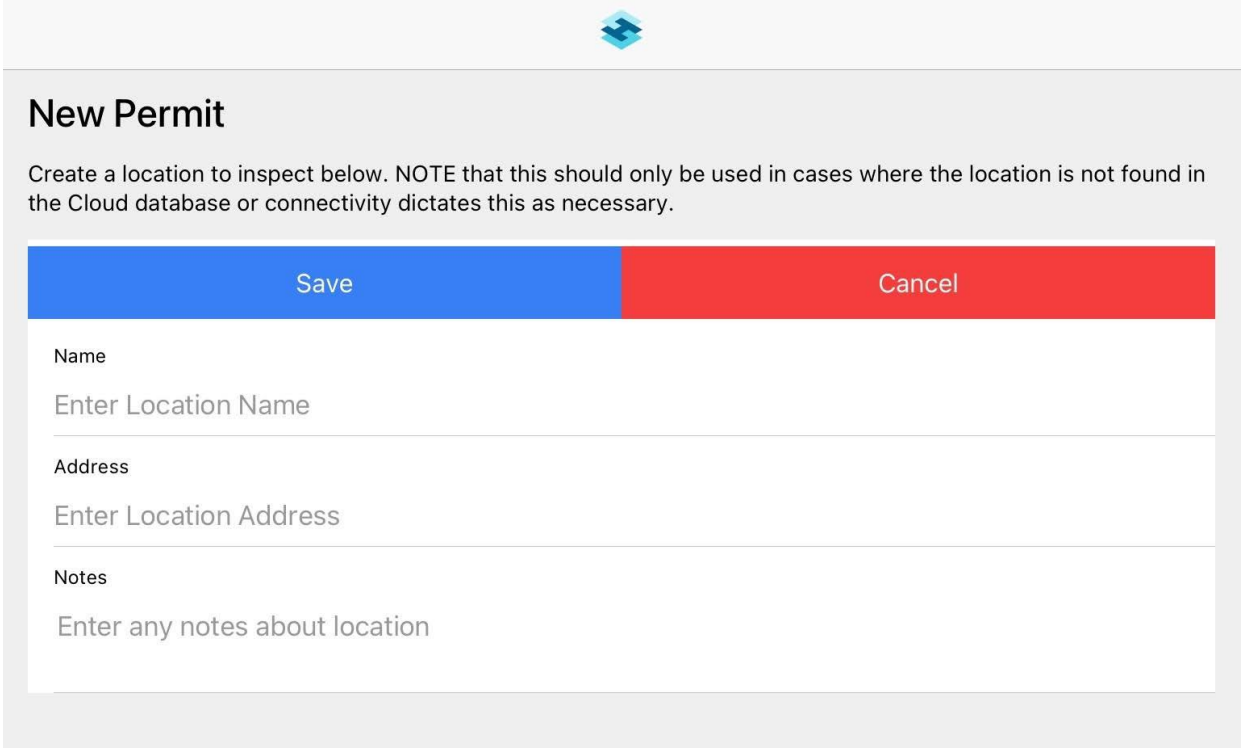
This feature will rarely be used but is helpful if you are in the field and find a facility operating that is not licensed and you want to perform an inspection. You can also use this if you want to conduct an inspection on a facility that you forgot to download into the app.

This feature is called "New Permit", but it will not create a record in the Permit Manager. It will give you the ability to do an inspection and tie it to some basic information until you get back into the office and can create the facility in HSCloud and tie them together.

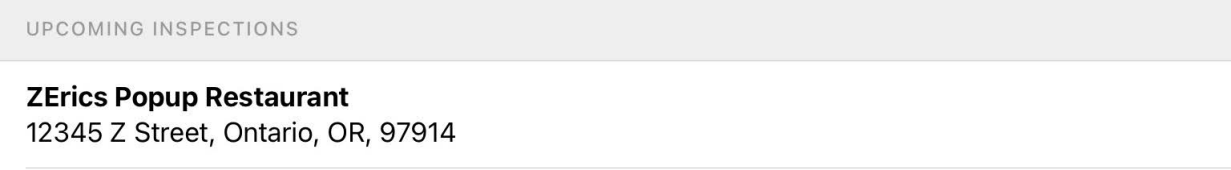
1. Click the New Permit + button on the bottom left of the HSTouch app home page



2. Fill out the fields that appear on the form and click the blue Save button at the top. You will want to have the facility fill out a license application form for you to take back to the office so they can have all the info to properly set up the new facility in HS CloudSuite.



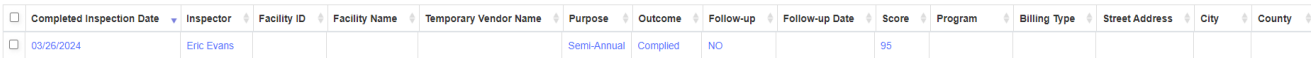
3. Click the List View button at the bottom of the screen. The newly added facility will appear here and give you the ability to start an inspection. If you don't see the facility in list view, then logout of HSTouch and log back in.



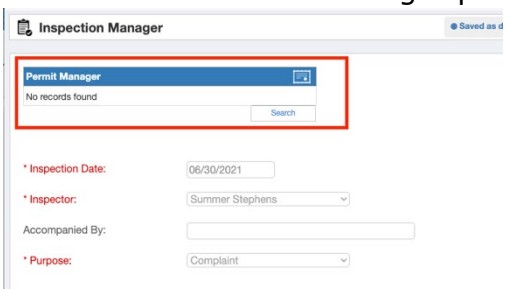
4. Complete the inspection in HSTouch as you normally would. Once you get back into an area of connectivity, upload the inspection to HSCloud.

Note: Your office staff may take over at this point to enter the facility and attach the inspection, so talk to them about how they would like to manage this in your office. The inspection report will not have the Facility Name or Owner Name populated at this time. You should wait to email the inspection until the office portion of this process has been completed.

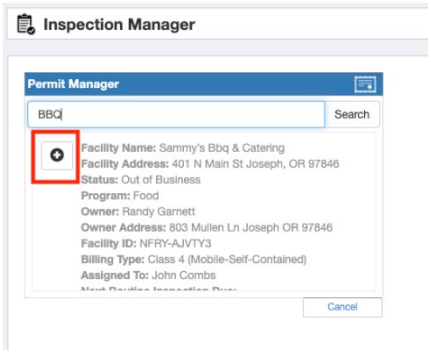
5. Login to HSCloud and open the Permit Manager to create a record for this facility once you have their completed paperwork.
6. Find the completed inspection in the Inspection Manager list screen and click to open the record. NOTE: You may not be able to find the facility by name. Instead, sort by the date to find the facility.



7. Next, we need to attach the newly added Facility to the inspection by using the search button on the Permit Manager parent record at the top of the Inspection screen.



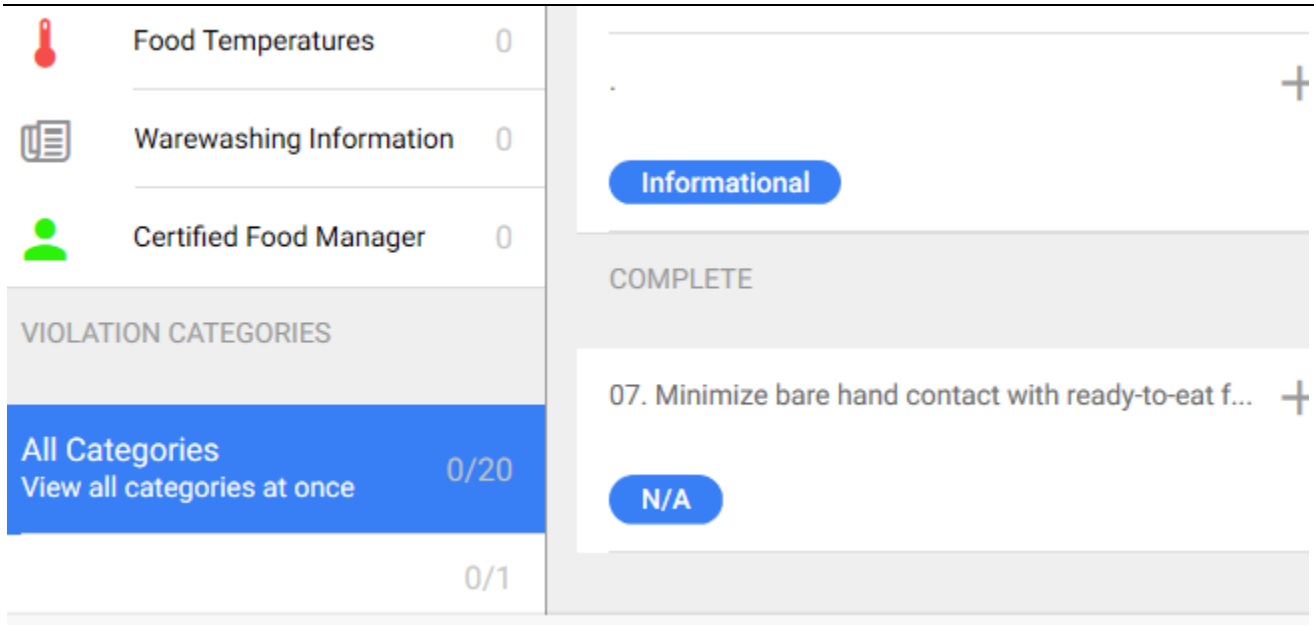
8. Search for the facility name and click the + sign next to the correct record to add it to the inspection.



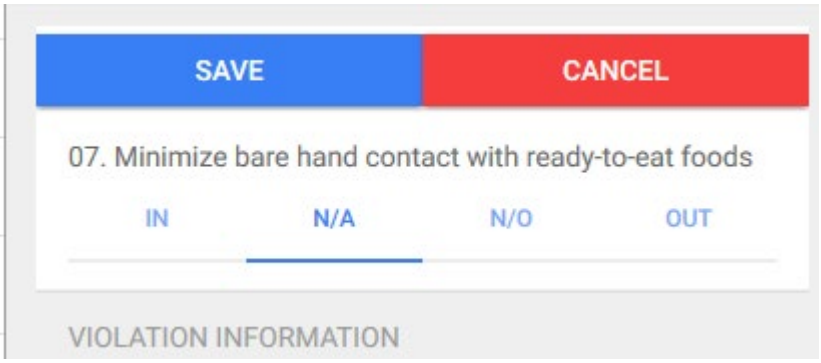
9. The final step is to re-save the inspection at the bottom of the page by clicking Save Changes.
10. At this point the inspection should be emailed.

Changing IN/OUT/NA/NO Items on an Inspection

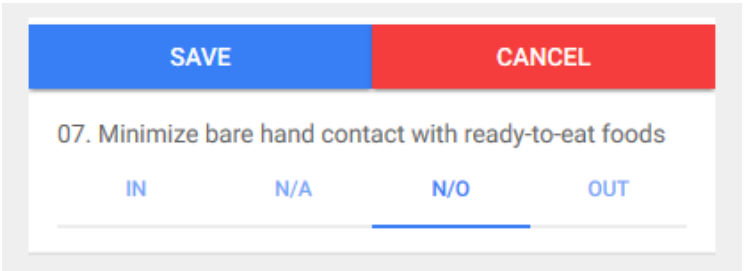
To change an IN/OUT/NO/NA item after you have selected it, just scroll to the bottom of the screen to find it in Completed and click on the blue item to open it (N/A in this example):



This will open a screen to allow you to select a different option:

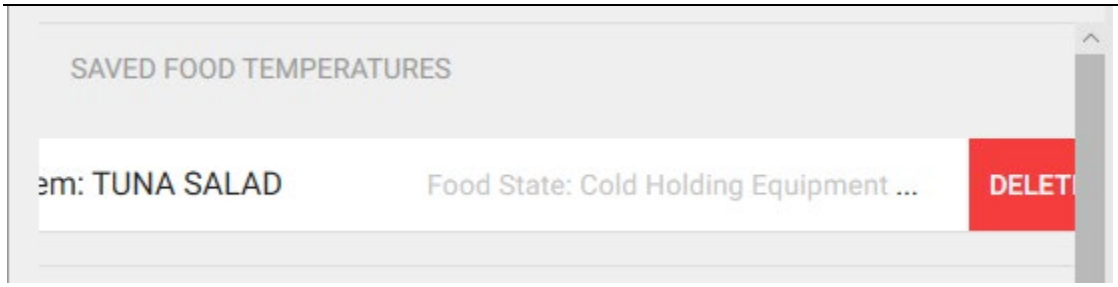


Then change the item to the one you want instead and click the blue Save at the top:



Deleting Items from the Food Temperatures/Pool Parameters Reloads

Swipe left (like in other parts of the program) with your finger or mouse and Delete will show for you to click:


SAVED FOOD TEMPERATURES
em: TUNA SALAD
Food State: Cold Holding Equipment ...
DELET

QuickStart Guide

1. Open the HealthSpace Touch App on an iPad.
2. Make sure the Tablet or PC is connected to the internet.
3. Enter the assigned HSTouch login associated Email address and Password, then click the login button or press Enter/Return/Go on the keyboard.
4. From the 'Sync Manager', select "Start Download" to refresh the facilities library and/or "Run Update" for any program design changes.
5. To begin, select the "Search" icon located on the righthand side at the bottom of the page.
6. Type in a keyword or an address in the "Search" bar to begin the search.
7. Select the facility or facilities to be inspected, from the search display, by clicking the black download indicator.
8. Repeat steps 5, 6 and 7 until all facilities have been downloaded and are listed in the "List View" under UPCOMING INSPECTIONS. This will ensure the ability to conduct the inspection if internet connectivity is not available when onsite.
9. Return to the "List View" by clicking the icon at the bottom of the page. Press or click on the name, for the location you would like to inspect.