

-Adding any EH Survey (Method #2)
 -Survey Searching

[1] Click the Surveys link as shown (a). Click the Add Survey link (b) to add “any” type of Survey/Inspection.

The screenshot shows the 'Environmental Health Surveys - Search' page. On the left, a navigation tree has 'Surveys' highlighted under the 'Environmental Health' section, with a callout 'a' pointing to it. At the bottom of the page, the 'Add Survey' link is highlighted with a callout 'b'. The main search area contains various filters like Survey ID, Survey Type, Location, and Inspection Rating. A callout box on the right says 'If ONLY doing a Survey Search, proceed to Step 5.' Another callout box at the bottom says 'Use this method to add a survey as an alternative to using the menu tree.'

[2] After clicking “Add Survey” in Step 1, select a Task Type, and then click Continue. If the Survey/Inspection is NOT a Food or General Sanitation Survey, proceed to step 4.

The screenshot shows the 'Master Schedule - Add Task' page. A dropdown menu for 'Task Type' is open, showing a list of survey types. 'Food Sanitation - Food Operation Inspection (EH/FP)' is selected and highlighted in blue. A callout box points to this selection with the text 'Pick the survey you need to add and 'Continue''. The 'Continue' button is visible below the dropdown.

[3 - Food and General Sanitation only] Select a Facility if adding a Food or General Sanitation Inspection. Click Search when ready.

The image shows two overlapping windows from a software application. The top window is titled "Create Food Operation Inspection Survey Task - Step 1 of 3 - Food Facility Search". It contains a search form with fields for "Facility Name", "Location", "Food Facility Type" (set to "All"), "Facility Start Date Between", and "Facility Stop Date Between". There are checkboxes for "Include Sublocations" and "Include Archived Records", and a "Search" button. A callout box points to the "Location" field with the text: "Under this method the facility search will look across the whole program office by default, so refine with a location OR select you location up front (i.e. prior to step 1)". The bottom window is titled "Locations - Search" and has a "Search" dropdown set to "Location Name", a "Country" dropdown, a "Search" button, and a "Browse by Location Tree" link. A "Cancel" button is also present.

[4] All Surveys in DOEHRs have a scheduling page. This should be *by-passed* by clicking 'Save and Begin Survey'. There is no need to populate the information on this page.

The image shows a "Master Schedule - Detail - Food Sanitation" page. At the top, there are buttons for "Save", "Save and Begin Survey", and "Cancel". A callout box points to the "Save and Begin Survey" button with the text: "'Save And Begin Survey' to by-pass this page". Below the buttons is a "Schedule Information" section with a table of fields. A callout box points to the "Facility" field with the text: "Do not modify these fields, ignore them". Another callout box points to the "Facility" field with the text: "The Facility has been applied to this page." and "The Facility does not apply if the Survey is NOT a Food or General Sanitation Inspection." The table contains the following data:




Location*	Installation US, MD, Aberdeen Proving Ground, 24004	Facility*	Bldg 2400, DFAC
Task Frequency*	One Time	Skill Level	
Projected Start Date*	2020/02/25 (yyyy/mm/dd)	Actual Start Date	
Previous Close Date		Actual Close Date	
Projected Due Date		Actual Due Date	
Required by Federal Standard	<input type="checkbox"/>	Task not Completed	
Comments		Status	

Below the table are sections for "Regulation Information", "Personnel Assignments", "Task Resource and Cost Information", and "Program Office Information". At the bottom, there are buttons for "Save", "Save and Begin Survey", and "Cancel".

[5] Survey Searching. Note: Only (1) filter is required. Use at will.

Environmental Health Surveys - Search

Please select one of the options below.

Survey ID	<input type="text"/>
Survey Type	All ▼
Location	<input type="text"/> 
Facility Name	<input checked="" type="checkbox"/> Include Sublocations <input type="text"/>
Inspection Rating	<input type="text"/> <ul style="list-style-type: none"> Satisfactory Marginal Unsatisfactory N/A Fully Compliant Substantially Compliant Partially Compliant Non-Compliant <div style="display: flex; align-items: center; gap: 5px;"> » « </div>
Responsible Program Office Personnel	All ▼
Status	All ▼
Between	Projected Start Date ▼ <input type="text"/>  (yyyy/mm/dd)
	Close Date ▼ <input type="text"/>  (yyyy/mm/dd)
	<input type="button" value="Search"/>

[Add Survey](#)

- 1) Type in a specific **Survey ID** for a specific survey.
- 2) Select a **Survey Type** to target only a specific type across many Locations or Facilities.
- 3) Use the magnifying glass to pick a specific **Location**, but only (1) at time.
- 4) Target (1) **Facility only**. *Partial name spelling is OK.*
- 5) Target (1) or multiple **Inspection Rating** types. Shuttle to right box.
- 6) Target the **Responsible Personal** (i.e. person who input the data).
- 7) Target the **Status** (In Progress, Ready for QA, etc.)
- 8) Target the date range. Note: **Projected Start Date** should equal Survey Start date. See step 4.
Close Date = date survey was marked Completed or Approved by QA.