FIREHOUSE
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FH User Guide

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1st 09/06, 2nd 10/08

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Chapter 1

About This Guide

The User Guide lists the steps to set up and use all record-entry areas of FIREHOUSE Software. Press **F1** while running FH for additional information.

Using This Guide

Procedures in this manual assume that FIREHOUSE Software (FH) is already running, that you have a basic understanding of how to navigate in Windows programs (for example, you are familiar with how to use a mouse to select a menu), and are familiar with the basic purpose of each module installed.

If FH has not been installed, follow the installation instructions included with the installation CD.

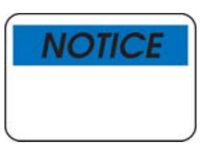
If you are not familiar with FH, use this manual while online help is running. When you encounter an unfamiliar form or function, press **F1** to access the Help File then press the Search tab. Type a term or keyword, then press Search. Topics containing your keyword are displayed. Highlight a topic and press Display for the details.

Throughout this manual, you will find specific types of information in paragraphs marked with special characters.

We have tried to minimize the amount of duplicated information included in the manual by referencing the information that is available elsewhere (rather than repeating it). When more specific information is available for a topic, the page number is referenced.

Example of a reference.

There are three levels of advisories included in this manual. Each level is indicated with a symbol:



Notice advisories contain general information that may save time and effort within FH.

Caution advisories contain information that can help you avoid minor inconveniences.

Danger advisories contain crucial information for avoiding loss of information.

Getting More Information

If there are any questions this manual does not answer, be sure to check out the FH Help File included with the system. To access the help file from the program, press **`F1`**, or select an option from the **Help** menu.

No internet connection is necessary to run the FH Help File.

The FH Help File is context sensitive, so when you are using specific areas FIREHOUSE Software, press **`F1`** and information about the area is displayed. The FH Help File can also be run separately from within FIREHOUSE Software by selecting the **Help** menu **FIREHOUSE Software Help File** option.

With the **FH Help File** displayed, you can use the **FH Help File** section to locate specific information, or go to Search, type in the keywords to search for, then press **`List Topics`**. Select a topic then press **Display**.

More help on using the **FH Help File** is available from the Tips for Using This File link at the bottom of the FH Help File home page.

Chapter 2

Lookups

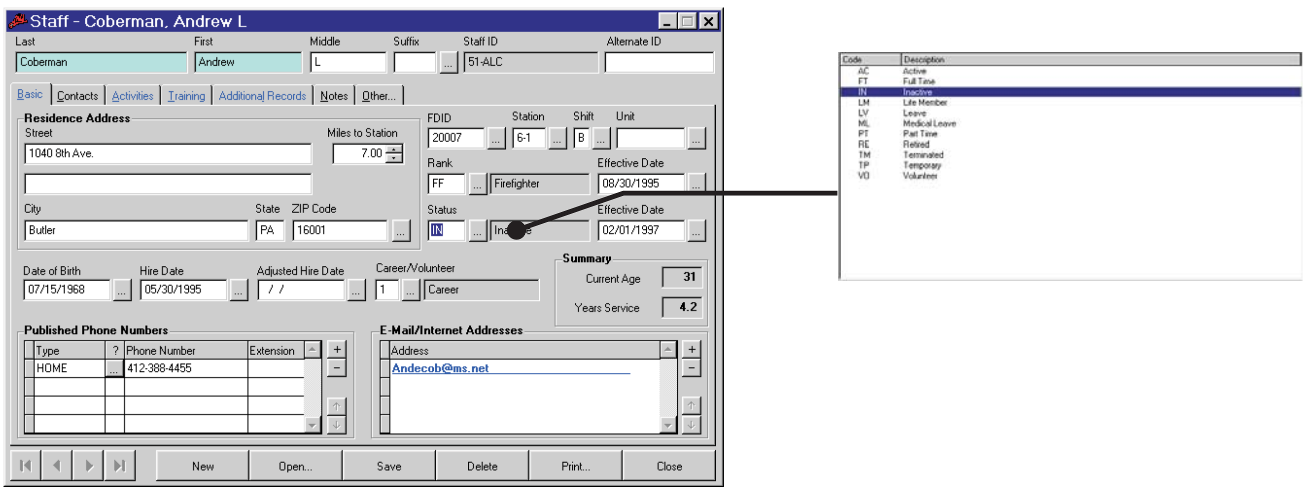
Lookup fields are used throughout data entry forms in FH to simplify data entry and to ensure consistent values. Date fields display a calendar for selecting a date. User-defined lookup fields display a set of values that can be inserted into the field.

Lookup fields are instrumental for categorizing records so specific records can be included in reports. Lookup fields list valid values, so instead of typing the information into the field, the value is selected. Administrators have additional control over entered information by limiting the ability of users to add, edit, or delete lookups.

There are two types of fields that can be populated with values, user-defined lookup codes and distinct values lookup fields. Lookup code fields include a code and description, and only codes added for the category can be added to the field. Distinct values lookup fields access a list of distinct values entered into that field in other records. Any value can be typed into a distinct value lookup (unless the category is locked), and the distinct value is available for use in new records as soon as the current record is saved.

About Lookup Codes

Lookup codes are stored in lookup tables. Each specific lookup table is divided into lookup code categories. The lookup category (or *lookup*) contains the valid values for a specific field. For example, “Staff Status” is a lookup category of the **Staff Activity and Training Codes** lookup table, and contain valid values to be used in the *Status* field on the **Staff Member** form.



The valid values are the lookup codes you have defined for the category. There are two elements that make up a basic lookup code:

- **Code**. The code is from 1 to 25 characters long, and identifies a specific code record.
- **Description**. The description is a detailed description of what the code represents.

Some lookups include additional elements that can be defined. When the lookups with additional elements are used in a record, the additional elements are automatically inserted into the fields that correspond to this additional information.

Each department sets up lookup codes differently depending on how they use the system. Some departments will not use all available lookup tables.

NOTICE
Code Set Up

Setting up the codes your department will use is a crucial setup task. The codes you enter will potentially save you time, but proper planning is essential. Once codes are set up, we recommend controlling access to lookup codes via security.

Some lookup code-driven fields are required to complete certain records. You can make other lookup-driven fields required from the **Administration Options** form. Other codes are useful for categorizing records so they can be used in reports and displayed in browser lists. You do not have to add every possible code before starting to use FH. The important consideration is that the codes are well thought out and that you have added as many as you need. You can add additional codes at any time.

When set up properly, lookup codes ensure consistent data entry while reducing the number of keystrokes to enter information. Codes also categorize records so reports identify types of records consistently and accurately.

Codes can be added to lookup tables on the fly as master records are added; however, we recommend that you set up your lookup codes before you start adding records.

Available Lookup Code Tables

Lookup codes are stored in tables. The chart below lists all lookup tables, along with the area in FH where the lookup codes are used.

Incident Report Codes	Occupancy Management Codes	Staff Activity and Training Codes	Equipment and Inventory Codes	Hydrant Management Codes	System-Wide Codes	User-Defined Field Codes	
X					X	*	**Fire Incidents**
X					X	*	**EMS Incidents**
X	X				X	*	**Occupancy**
	X				X	*	**Inspections**
		X			X	*	**Activity**
		X			X	*	**Staff**
		X			X	*	**Training**
		X			X	*	**Training Program**
			X		X	*	**Inventory**
				X	X	*	**Hydrant**

* Lookup codes can be added to user-defined fields throughout FH.

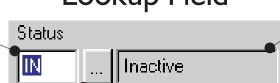
Invoicing and Accounts Receivable codes are also available with the optional FH Accounts Receivable module. For more information on the invoicing and accounts receivable codes, see the FH Accounts Receivable Installation and Introduction Guide. More information about each lookup table is available on page 11, "Setting Up Lookup Codes".

To Complete a Lookup Code-Driven Field

Data entry forms throughout FH include lookup-driven fields. Below is a description of a typical lookup-driven field.

Anatomy of a Lookup Field

Field for entering valid lookup code.



After a lookup code is entered, the lookup codes description is displayed.

Press to display valid lookup codes.

Entering lookup codes on data entry forms (for example, the **Staff Member** form) is simple.

If you know the code you wish to add to the record, you can type it directly into the field. Press **Tab** to move to the next field, and the description of the code is included. If the code is not valid, the field is marked as invalid and positioning the cursor over the field displays additional information.

If you know the description, part of the description, or keywords in the description type this in the description field. If only one matching description is identified, the code and description is inserted. If there are multiple descriptions matching, they are displayed and the proper code can be selected. If you will generally be selecting codes using the description, you can reverse the order so that the description is listed before the code field via the **Workstation Options** form *General* section.

If you do not know the code or description, you have several alternative methods for displaying valid values:

- Press ... to display valid values for the field.
- With the cursor in the desired lookup-driven field, press the **F2** keyboard key to display valid values (unless disabled in **Workstation Options**).
- Right-click your mouse with the cursor in the lookup-driven field and select the **Lookup** option.

NOTICE
Workstation Options

By enabling right mouse lookups in **Workstation Options**, available lookup codes are *directly* displayed by pressing the right-mouse button with the cursor in the lookup-driven field.

To Install Preset Lookup Codes

FH includes sample lookup codes in the DemoData database. You can install these preset codes:

- From the **Tools** menu, select **Lookup Tables…**
- Select a specific lookup table and category, then press **Options**. If preset codes are available for the area, an **Install Preset Codes** option is listed.
- Select preset codes, then press **Install**.

To Print a List of Lookup Codes

1. Access the **Reports** menu.
2. Select the appropriate report category for the codes you want printed.

Incident Report Reports
⊟ NFIRS Incident Reports NFIRS Incident Code Listing ⊟ EMS/Search & Rescue Reports EMS Incident Code Listing
Occupancy Management Reports
Inspection Violation Code Listing Occupancy Code Listing
Staff, Activity, and Training Reports
Personnel/Training Code Listing
Apparatus, Equipment, & Inventory Reports
Apparatus/Inventory Management Code Listing
Hydrant Management Reports
Hydrant Management Code Listing
Invoicing and Accounts Receivable Reports
Invoice/Accounts Receivable Code Listing
Administrative Reports
⊟ System-Wide Codes Aid Depts and Investigating Agency Listing City, State, ZIP Code Listing FIPS County Codes Listing General System Codes Listing Insurance Companies/Agents Listing Station Listing Street Listing Unit Code Listing

3. With the appropriate report highlighted, press **Run**
4. Select your output option, then press **OK**. The **Query Parameters** form is displayed.
5. Specify criteria or press **OK** to include codes in the lookup table.

Setting Up Lookup Codes

If you already have information that will be used for your codes, you may be able to import the information to FH.
See "Transferring Lookups" on page 21 if a neighboring department has lookup codes you can use.

It is important to consider how you will be using the lookup codes before you add them, since it is more difficult to change your codes after you have started to enter records. Work the codes out on paper before using them in the system. Your codes should be completely set up before any operational data is added. Once you have added the codes, access for modifying codes should be restricted.

Codes can be added to and edited at any time. If the code has been used, you will not be able to delete it unless you remove the code from each record or merge the code you wish to delete with another code. The more planning you put into codes, the more likely the codes will save time during data entry. Be sure to look at the codes in the DemoData to familiarize yourself with general code schemes.

Codes are displayed alphabetically or numerically, meaning that a code of "1" is displayed before "2", and "A" is displayed before "B". Keep the following in mind:

- Keep codes the same number of characters to ensure predictable sorting. For example, if you use 1 through 99 for a specific code, pad the 1 character-wide codes with zeros to the left (for example, change "1" to "01").
- All codes in each category must be unique, regardless of whether they are grouped or not.
- Keep special use codes together, so they are displayed together.

The last point is often overlooked when setting up codes. If related codes are displayed together, users are more likely to select the correct code. Note that when multi-select is available, you can select multiple codes from multiple groups.

Tip For predictable sorting, codes should all be the same length. For example, if you set up codes for **Pay Scales** and you have 20 different codes for pay scale, with varied length codes (e.g., **1** for Fire Response, **2** for Fire Response to Medical, and **10** for Medical Response), the sort order may not be what you anticipate. Using the example codes, the Pay Scales codes would be sorted as follows:

Code	Description
1	Fire Response
10	Medical Response

2 Fire Response to Medical

The solution is to left pad with zeros so all codes are of equal length (i.e., **01** for Fire Response, **02** for Fire Response to Medical, and **10** for Medical Response). Find your longest code, and make all codes equal length by padding zeros to the left. For example, a six digit code for one padded to the left with zeros is 000001.

Minimum Recommended Codes to Add

You do not need to add lookups to all available categories. The minimum recommended codes to add are listed below by module.

Minimum Recommended Incident Report Codes

NOTICE

Find Codes

Add keywords to comments for NFIRS 5.0 codes that are difficult to remember. When you insert the NFIRS 5.0 code into an incident, use the word or phrase search and use the keyword you entered to quickly locate the code.

- *911 Used Codes*. 1 character maximum codes that indicates different types of 911 used. Can be required, depending on system settings.
- *Aid Given or Received*. Restricted, but you can press **New Plus-One** to add a code. Enter 1 character codes for types of mutual aid received and given. Can be required, depending on system settings.
- *Alarm Types*. 2 character maximum codes that indicates different types of alarms. Can be required, depending on system settings. If there is a type of situation your department tracks, but the situation is not included in the NFPA Type of Situation code (which can not be modified) use this field. You can then run reports for incidents that use the Alarm Type code to track the type of situation.
- *Departments/Investigating Agencies*. 10 character maximum code for departments and/or units that give and receive mutual aid in your area. Can be required, depending on system settings.
    - Additional data elements associated with this code are only required if running multiple FDID's:
      Their FDID
      Their ORI
      Their FID
      Their EMS Svc #
      Street Address
      City, State, ZIP
      Phone Numbers
      Email Addresses
      Group
      Comments
- *Response Codes*. 2 character maximum code for different types of unit response. Required to complete responding unit records. *Response Codes* are useful for determining how units are being used by the department.

Minimum Recommended Occupancy Management Codes

- *Preplan Codes*. 6 character maximum code for different types of preplans tracked by your department. Examples include electrical services, HVAC system information, and security systems.
- **Inspection/Activity and Violation Codes** include:
  - *Inspection/Activity Types*. 5 character maximum code for different types of inspection and occupancy related activities. Examples include consultations, inspections, and plan reviews.
  - Expand **Violation Code Sets** to display available code sets. You can add violation codes individually, or install additional violation code sets. Contact your FH sales representative for more information on available code sets.
    - *Violation Codes*. 25 character maximum code, along with the violation article, division, page, and default fine amount for the violation. The default information can be modified. The violation code set included by default is UFC 1988.

Minimum Recommended Staff Activity and Training Codes

- *Staff Activity Positions*. 2 character maximum code for different positions a member can serve on in an activity.
- *Staff Activity Types*. 12 character maximum code for different types of activities personnel are involved in. Examples of staff activities include on scene, standby, meetings, work detail, and fund raising. A *Staff Activity Type* code is required to complete staff activities.

NOTICE
Default Hours and Points

Add the default hours, default hours paid, and default points for the activity code. When you add default information and this activity code is used in a staff activity, the default information is entered for the staff activity (it can be modified from the staff activity if necessary).

- Expand **Staff Member Codes** to display available codes:
  - *Pay Scales*. 5 character maximum codes for pay scales, and the default pay scale rate. Pay scales can be used to give a member a flat rate amount for a specific activity, the pay scale can be set as an hourly amount, or as a flat rate added to the staff member's default hourly rate.
  - *Staff Availability Type Codes*. 2 character maximum codes for different types of staff member availability. These codes are used in availability records. Add codes only if you plan on using participation reports based on the percentage of availability.
  - *Staff Driver's License Types*. 5 character maximum codes for different types of driver's licenses.
  - *Staff Member History*. 5 character maximum codes for historical activities you want to track for staff members. These activities can include immunizations, physicals, tests, certifications you do not have training programs set up for (for example, an undergraduate degree), or any historical activities you want to track.

- *Staff Rank Codes*. 10 character maximum codes for different staff ranks/titles.
- *Staff Status Codes*. 3 character maximum code for different staff employment statuses. Full time, volunteer, retired, and medical leave are examples of possible statuses.

- Expand **Training Class, Program and Instructor Codes** to display available codes.
  - *Instructor Codes*. 15 character maximum code for instructors. This code indicates the instructor responsible for training the staff member. The codes do not have to refer to a specific individual, but you can add codes in the staff record (**Staff** form *Other* section) for an instructor, and if the code has not been added to the lookup table, the name of the staff member will be automatically inserted into the description for the code.
  - *Training Categories*. 12 character maximum code for the training category. This code categorizes training classes into categories. You can also associate default hours, hours paid, points, and objective that are inserted into the training class and applied to training participant detail records. The *Training Categories* code is a required field.

Minimum Recommended Equipment and Inventory Codes

- *Equipment Location Codes*. 10 character maximum code for equipment locations. Examples include compartment, crosslay, etc. These codes are used in master apparatus records and generic equipment records. Add groups for major apparatus records, then name the specific location codes in each group so they will be displayed in the order of the physical locations. Refer to the codes in DemoData for an example of how to set up location codes.
- *Inventory Class Codes*. 10 character maximum code categorizing equipment into general classes. This field is used in the *Eqpt Class* field in the **Apparatus and Equipment** form.
- *Maint/Test Job Codes*. 10 character maximum code for different types of maintenance and testing you will perform on apparatus and equipment. These codes should be general enough so they can be applied to all apparatus and/or equipment (for example, “Change Oil”, rather than “Change Truck Oil”).
- *Usage Type Codes*. 6 character maximum code for different ways equipment and apparatus will be used. Fire response, maintenance, and HazMat response are all examples. Add Usage Codes for generic consumable items like fuel or water. From the Apparatus and Equipment form, Usage section, you can add an apparatus/equipment usage detail indicating the quantity used.
- *Vendor Class Codes*. 6 character maximum code for different categories of vendors.

Minimum Recommended Hydrant Management Codes

- *Hydrant Class Codes*. 2 character maximum code for hydrant class. Hydrant classes usually indicate the relative capacity of the hydrant.

- *Hydrant Defect Codes*. 6 character maximum code for defects and flaws found in hydrant inspections. These codes are used in hydrant inspection/repair details if a repair is indicated.
- *Hydrant Main Type Codes*. 6 character maximum code for different types of mains used for hydrants in your jurisdiction.

Minimum Recommended System-Wide Codes

- *Counties*. 5 character maximum code for counties. County is a required field in certain states. Associate a *FIPS Code* (you can select from a list by right mouse-clicking) for each county code you add.
- *District*. 5 character maximum code for districts set up in your department's area. If your department coverage area is not divided into districts, you do not have to use this field.
- *Shifts*. 1 character maximum codes for shifts. If your department does not have multiple shifts, you do not need to use this field. Departments that do use formal shifts can still use this code. For example, a code for night and day can be used to track the number of incidents that occurred during the day and during the night.
- *Station*. 3 character maximum code for each station in your department. This field is useful when running reports at multi-station departments that summarize information. For example, list response times by running the "Response Time Analysis" report and select the station you want to list the information for.
- *Townships.* 4 character maximum code for townships covered by your department. Departments that track boroughs instead of townships can use this field for boroughs.
- *Units*. 6 character maximum code for units. These codes represent specific apparatus from your department that are used when responding to specific incidents. *Unit* codes are entered in responding unit records and in apparatus and equipment master records.
- *Zones*. 10 character maximum code for zones. Use zones to define service areas into geographic area. If you are looking for a field to track "box" numbers, use the *Zone* field, described below.
- Expand ⊞ **Cities, States, and ZIP Codes** to display available codes.
  - *City, State, ZIP*. Enter the cities, states, and ZIP codes commonly covered by your department.
- Expand ⊞ **Streets** to display available codes.
  - *Street Names*. Enter streets commonly covered by your department. Note that you can not repeat the same *Prefix + Street/Highway + Type + Suffix*; all additional fields associated with streets are defaults that will be inserted into records when the street is used as default values. Enter additional values only when the values are appropriate all the time. Even if you do not plan to add all streets as you start to use FH, you should enter some basic streets. At a minimum, enter the busiest streets into this category.

Adding Lookup Codes

To add or edit lookup codes, you first have to access the lookup codes. Next, add the lookup codes as needed. You can set up or modify groups that specify how lookup codes are grouped together (see page 14 this chapter).

NOTICE
Access Lookup Directly

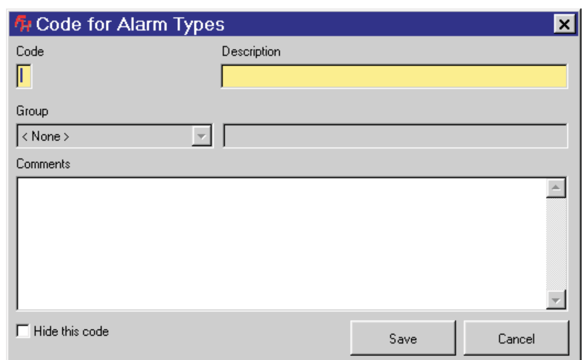
You can also add, edit, and delete lookup codes to a single category directly from lookup-driven field.

To Add a Lookup Code

- Select the **Tools** menu, **Lookup Tables** option. A form displaying available lookup code tables is displayed.
- Select the lookup table you want to modify.
- To display code categories for a code category group, press [+].
- Select a specific code category by highlighting, then press **Setup**. The **Lookup** form is displayed listing all codes for the category.
- Press **New** and a blank **Code For** form is displayed.
- Add values to the *Code* and *Description* fields. Completing the *Comments* field is optional.

  Additional available fields are available for certain lookup codes. When you add values to these extra fields, those values are added to the appropriate record fields when the lookup code is used.

Some lookup codes have slightly different fields than the example below.



- Check *Hide This Code* if you want to exclude the code from the Lookup form (hidden codes can be displayed by checking *Show Hidden Codes* at the bottom of the **Lookup** form).
- Press **Save**. The code, description, and comments are added to the lookup codes, or if you edited an existing code, the modifications are added.
- Repeat the steps above for each code you wish to add, then press **Close** to return to the **Lookup Tables** form.
- Press **Close** if finished.

To Edit a Lookup Code

NOTICE
Changing Codes In Use

When you edit a lookup code that is used in a record, FH will change the value in the FH record to match any changes you make. This process may take some time. If you want to combine an existing lookup code with another code, use the merge lookup code feature.

- Select the **Tools** menu, **Lookup Tables** option. A form displaying available lookup code tables is displayed.
- Select the lookup table you want to modify.
- To display code categories for a code category group, press +.
- Select a specific code category by highlighting, then press **Setup**. The **Lookup** form is displayed listing all codes for the category.
- Press **Edit** and the **Code For** form is displayed with the existing code information.
- Edit values to the *Code* and *Description* fields.
- Check *Hide This Code* if you want to exclude the code from the Lookup form (hidden codes can be displayed by checking *Show Hidden Codes* at the bottom of the **Lookup** form).
- Press **Save**. The code, description, and comments are added to the lookup codes, or if you edited an existing code, the modifications are added.
- Press **Close** if finished.

Transferring Codes Between Separate FH Installations

There are alternatives to manually entering each lookup code one at a time. Lookup codes can be transferred between different copies of FH. For example, if there are two departments in the same county that use FH and they use the same general system codes (like streets), the first department to set up the codes can share the set up codes with the second department.

Transferring codes is a two step process:

- Copy to.
- Install from.

To Copy Lookup Codes to an Installable FH File

- Select the **Tools** menu **Lookup Table** option.
- Select the lookup table that contains the codes you wish to copy from.
- Press **Options**, then **Copy To**.
- Press **to File** and specify a path and file name you want the codes copied to, then press **Save**.

- Press **OK**. The codes are copied to the specified path and file name.

To Install Lookup Codes from an Installable FH File

- You will need to move the file you created to a location that can be accessed by the workstation you are installing the codes at.
- From the **Administration** menu, select the **Install New or Updated Components** option.
- Press **Install From**, then select the path and file name you want to install the codes from, press **Open** then **OK**. A list of lookup categories available for installation (and additional items if included) is displayed.
- Tag the lookup categories you wish to install.
- Select the install method:
  - Select *Merge new or updated components with existing components* to add the code to your existing codes without deleting your current codes.
  - Select *Replace existing components with new or updated components* to completely erase your current codes when installing lookup codes. If you install codes and select *Replace existing components with new or updated components*, overwritten codes will remain in records they were entered in, resulting in records containing invalid data.
- Press **OK** to add the lookup codes, or **Cancel** to exit without installing the lookup codes.

Importing Lookup Codes

If you have data that will be used in lookup codes available in ASCII or .DBF format, you can import this information directly into FH without manually entering it.

Most applications can export to ASCII or .DBF formats. DBF is recommended. Use an application such as Microsoft Excel or Lotus 123 to manipulate and format the data if necessary prior to importing (for example, if the application where the information originates does not export to a FH required import format, use the “helper” application to open and format, then export to a supported format).

Once you have the data available for importing, import using the **Administration** menu, **Database Administration** option, **Import from External Data Source** option.

To Import Lookup Codes

- Press **New**. The **Select Import Type** form is displayed.
- Select either *Standard Database Import* or *Lookup Table Import*.

- Select *Standard Database Import* if the source data includes more than one category of lookup code (for example, streets AND counties).
- If the source data includes only one category, select *Lookup Table Import*. When *Lookup Table* is selected, the *Category* field is required. Press the lookup button and select the desired target lookup table.

The remaining procedure assumes that the source data includes only a single lookup category, and that the source is either DBF or delimited ASCII.

- Name the import, specify source type, and select source file.

See the **Advanced Feature Reference** "Import External Data" chapter for more specific information.

- Press **Add**. The **External Data Import Field Properties** form is displayed with the target table already selected.
- Select the target field, then double click on the field from source table that goes to target. *Code*, *Description*, and *Comments* are the fields you will most likely use. Class is only used if lookup codes are grouped.
- Save and close the **External Data Import Field Properties** form.
- Save and close the **External Data Import Properties** form.
- Press **Run** to import the data.
- Press **Commit** to add the data to the specified lookup.
- Press **Close**.

Setting Up Code Groups

Code groups allow similar codes to be stored together under common headings. Groups are optional, and when used properly, organize the lookup codes for a specific category into manageable lists. When a specific lookup is displayed, group names and ungrouped codes are displayed. For example, if street codes were divided into two groups, alphabetic streets and numbered streets, the lookup would look like this when displayed in a lookup table:

See “Setup Code Groups” on page 14 in this chapter.

⊞ Alphabetic

⊞ Numeric

Each group can contain many street names. Selecting a group drills down to display the codes associated with the group. For example, the “Alphabetic” group was selected below, so the associated codes are displayed below the group:

- Alphabetic
  - Any Street
  - Baker Avenue
  - Etc.
- Numeric

You can display and hide codes for the group, minimizing the amount of scrolling required to view all lookup codes. Below are our recommended guidelines for using lookup code groups:

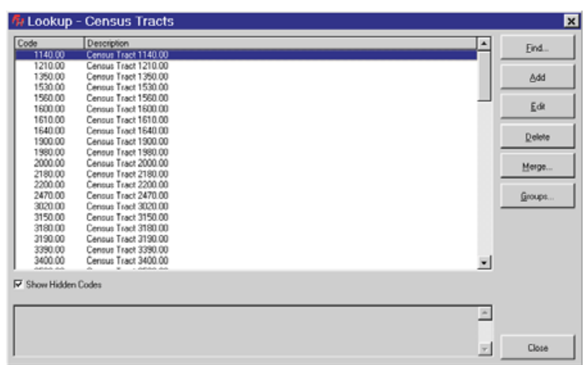
- If you have more than 50 codes, groups will probably reduce time spent searching for specific codes.
- Limit yourself to 50 groups, if possible.
- Make group names as descriptive as possible.
- Select groups that will be understood by all users.

In this example, we will add groups to the *Census Tract* lookup in the DemoData. By grouping tract codes numerically, you will be able to access all *Census Tract* lookup codes with less scrolling.

To Add Groups (Using Census Tracts as an Example)

- Select the **Tools** menu **Lookup Tables** option.
- Highlight the area and category to add groups to, then press **Setup**.
- Press the **Groups** button. The **Lookup Groups** form is displayed.
- Press **New Group**. The **Group for Census Tracts** form is displayed.

In this example, **Census Tracts** was selected from the System-Wide Codes while using the DemoData database directory. The information pictured was created specifically for this example.



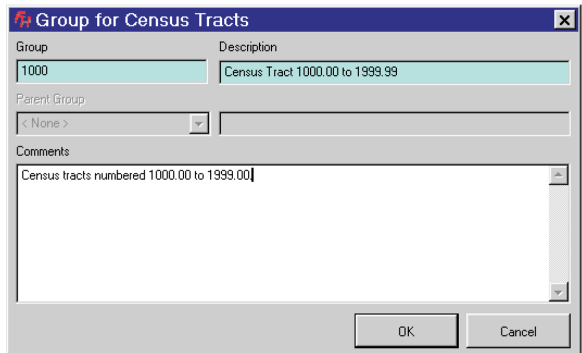
- Type in the group name, description, and comments. Comments are optional.

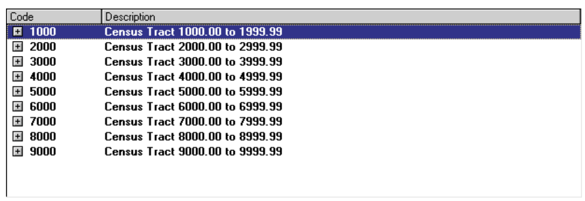
- Press **OK**. The **Lookup Groups** form is displayed with the codes that are available to be added to the group.

In this example, groups are added so *Census Tract* codes are grouped together by numeric ranges to reduce scrolling down the code list for census tract codes in the higher ranges.

NOTICE
Code Availability

All codes are available to be added to a group whether they have been added to another group or not. Adding a code to a group when it has already been added to a previous group removes it from the original group and adds it to the new group.



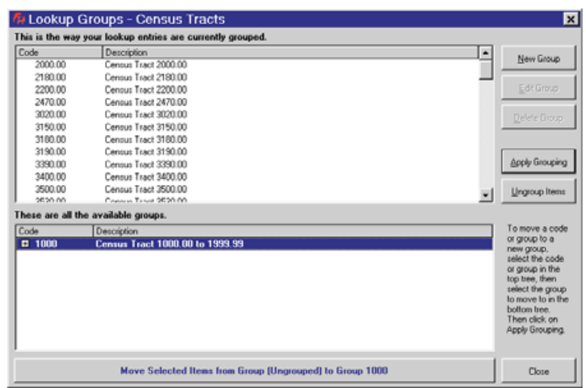


Grouped codes are displayed to the right. Press + to display codes added to the group. See Setup page 20 for an illustration of groups.

- Codes are listed as they are grouped in the top field. Group names are displayed in the *These are all the available groups* area. Select the group to add the code to.
- Add groups and move codes until each group includes the codes you want to associate with it.

Highlight the code(s) to add to a group in the top list and highlight the group in the bottom list, then press **Apply Grouping** to add the item to the selected group.
To remove a code from a group, press to the left of the group name in the bottom list to expand the list. Select the code(s) to remove, then press **Ungroup Items**.
To move codes from one group to another, expand the group containing the code to move in the top list and select the group to move the code to in the bottom list, then press **Apply Grouping**.

- Press **Close** when you are finished, and the lookup codes will be grouped as you have specified. In the example below, groups were added to census tract codes for numeric ranges.



About Distinct Values Lookups

Distinct values lookup codes are fields with access to a list of distinct values made into that field in other records. Any value can be typed into a distinct value lookup (unless the category is locked), and the distinct value is available for use in new records as soon as the current record is saved. The *Dispatched For* field in the **EMS/Search & Rescue Report** form is an example of a distinct lookup field.

Distinct value lookups will accept any text by default. If necessary, the category can be locked to prevent user entry, in which case the lookup behaves like a lookup code field without the code field. Distinct values for categories can be shared by other categories likely to use the same values (for example, the *Equipment Brand* category in fire reports will likely use the same values as the Equipment Model category in HazMat reports) and distinct values can be edited and merged with one another.

Distinct values lookups are available in the following areas:

Record Area	Category	Field Caption
Dispatch & Remote Station Incident Reports	Reason	Reason
EMS/Search & Rescue - Billing/Guardian Information	Relationship to Patient	Relationship to Patient/Victim
EMS/Search & Rescue - Meds Administered	Dosage (free entry)	Text Description and Other Instructions
EMS/Search & Rescue - Patient/Victim Insurance	Relationship to Patient	Relationship to Patient/Victim
EMS/Search & Rescue - Patient/Victim Reports	Account Number	Patient Account #
	Attending Physician	Attending Physician or Designee at Destination
	Complaint	Chief Complaint
	Primary Physician	Primary Physician
	Reason For Transport	Reason for Transport
	Secondary Complaint	Secondary Complaint
EMS/Search & Rescue Incident Reports	Reason for Call	Dispatched For
EMS/Search & Rescue Patient Report Authorizations	Assignment	Assignment

Record Area	Category	Field Caption
Fire Reports	Equipment Brand	Brand
	Equipment Model	Model
	Mobile Property Model	Model (in Mobile Property area)
Fire Service Casualty - Equipment Failures	Equipment Manufacturer	Manufacturer
	Equipment Model	Model
HazMat Reports	Equipment Brand	Brand
	Equipment Model	Model
	Mobile Property Model	Model (in Mobile Property area)
Incident Report Authorizations	Assignment	Assignment
Investigation - Evidence Collected	Collected By	Collected By
Investigation - Photographs	Taken By	Taken By
Investigation - Tests Performed	Performed By	Performed By
Staff Member Insurance	Relation to Staff Member	Relationship to Insured

To Lock Distinct Values Lookup Category

- From the **Tools** menu, select **Distinct Value Lookups**.
- Highlight the distinct lookup to modify then press **Setup**.
- Check *Lock field date entry to only allow the values currently displayed in this list*. The list of other areas where the distinct values will be available are listed.
- Press **OK**.

To Add Distinct Values Lookups (Category Locked)

- From the **Tools** menu, select **Distinct Value Lookups**.
- Highlight the distinct lookup to modify then press **Setup**.
- Press **New**.
- Type a distinct value, then press **OK**.

To Merge Distinct Values Lookups

- From the **Tools** menu, select **Distinct Value Lookups**.
- Highlight the distinct lookup to modify then press **Setup**.
- Highlight the specific value to remove ("Pane" in this example), then press **Merge**.
- Select the value to use in the future then press **OK**.
- The new value is applied to records that used the old value. The previous value is no longer available.

To Share Distinct Values Lookups Across Categories

- From the **Tools** menu, select **Distinct Value Lookups**.
- Highlight the distinct lookup to modify then press **Setup**.
- Check *Combine lookup options for this field with other common fields*. The list of other areas where the distinct values will be available are listed.
- Press **OK**.

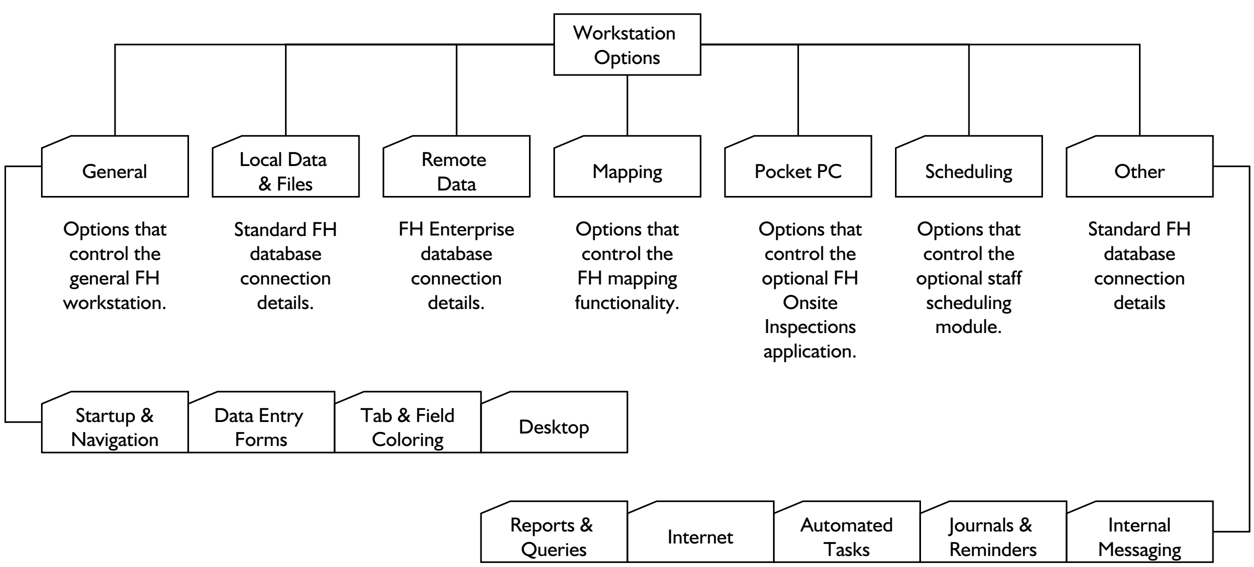
Chapter 3

Workstation Options

Workstation options are program settings that adapt the program to your department's unique requirements. Be sure to review available options listed in this chapter before you start entering live data.

Note that some installations will include sections not detailed in this manual. See the FH Help File for information on sections not detailed in this guide.

Diagram: Workstation Options Form Sections



Specifying Workstation Options

Workstation options apply to all users at the workstation unless *Allow individual user preferences* is enabled from the **Administrative Options** form *General* section.

About Workstation Station Codes

Workstations can have a *Station* code associated with them that can be defaulted into new records initiated at that workstation. To use the *Station* code associated with the workstation, you must also select *Use the station where the location is physically located* option on the **Administrative Options** form *Database* section *Rules & Defaults* section.

To Assign a Workstation-Specific Station Code

- Select the **Tools** menu, **Workstation Options** option.
- Click the *General* tab, *Startup & Navigation* tab.
- Type or look up *Workstation Location*. The station value entered is defaulted in *Station* fields for new records initiated from the workstation unless otherwise specified in **Administrative Options** form *Database* section *Rules and Default Values* section.
- Press **OK**.

About Startup and Navigation Options

Control the startup options and basic form navigation options for the workstation.

To Specify Startup Options

- Select the **Tools** menu, **Workstation Options** option.
- Click the *General* tab, *Startup & Navigation* tab.
- Check *Automatically load the Reminders form on login* to display the **Reminders** form after logging in to FH.
- Check *Automatically load the Journal on login* to display the **Journal** form after logging in to FH.
- Press **OK**.

To Specify Field Navigation Options

- Select the **Tools** menu, **Workstation Options** option.
- Click the *General* tab, *Startup & Navigation* tab.
- Check *Beep on record save and notifications* if you want the computer to beep when those events occur.
- Check *If you type to the end of a field, automatically advance to the next field* to advance to the next field when the field value fills the field (for example, typing the 10 characters of a telephone field).
- Check *Highlight the entire field when you tab into it* to highlight the contents of a field when you first advance to a field using `Tab`.
- Check *Clicking the right mouse button activates the field lookup* if you want to display lookup selections using your right mouse button (when cursor is positioned in a lookup-driven field).
- Check *Pressing F2 activates the field lookup* if you want to display lookup selections using your `F2` keyboard key (when cursor is positioned in lookup-driven field).
- Check *Allow cursor to tab into description field for "on-the-fly" searches...* to look up codes by their description. When enabled, the cursor will go to the code description field instead of the code field when you navigate through the data entry form using your `Tab` keyboard in the following manner:
    - Select 'Conditionally' to only tab into the code description field when the code is required and a code has not been entered, or when the entered code is invalid.
    - Select 'Always' to always tab into the code description field whether the code has been added or not.
    - Select 'Only' to skip the code field and always tab in to the code description field. You can still put your cursor in the code field using your mouse.
- Press **OK**.

About Data Entry Forms

Control data entry form behavior. Data entry form behavior should be tailored to how the workstation will primarily be used.

To Specify Data Entry Form Options

- Select the **Tools** menu, **Workstation Options** option.
- Click the *General* tab, *Data Entry Forms* tab.
- Select **When a data entry form first loads** option:
    - Select "Load the last record I was working with" to display the last saved record when you open any data entry form.

- Select "Start with new, blank record" when you open any data entry form. Select this option if you will always be adding new records when you open records.
- Select "Display the default query so I can select records" to display the list of available records when you open any data entry form.

- Check *Display confirmation prompt before adding new records* to prompt the user when new records are created. Adds an additional step to record creation, but may minimize accidentally created records.
- Check *Auto-apply the default memorized template (if there is one) to new records* to use the default memorized template when you create new records.
- Check *Query and display any matching records before adding a new record* to display records with matching values when a value entered in the key field of a new record matches the corresponding value of an existing record. Adds an additional step to record creation when entering records that share key values, but may prevent accidentally entering the same information twice.
- Check *Confirm master record deletion by typing "Yes"* to prompt users before deleting master records. Adds an additional step to record deletion, but may minimize accidental master record deletion.
- Check *Hide the "Delete" button from the bottom of data entry forms* to remove the **Delete** button from master record data entry forms. Records can still be deleted from the **Form** menu.
- Check *Hide the "Delete" button from linked record lists* to remove the **Delete** button from master record data entry forms where linked records are listed. To delete a linked record, open the linked record and press **Delete**.
- Check *Automatically save the current record every* and specify the interval in minutes. Records with required elements missing are not saved.
- Press **OK**.

About Tab & Field Coloring

Specify the colors used for data entry form tabs and fields. FH data entry forms are color coded to indicate required, complete, and incomplete data elements.

To Specify Tab & Field Coloring

- Select the **Tools** menu, **Workstation Options** option.
- Click the *General* tab, *Tab & Field Coloring* tab.

- Check *Use color coding for data entry tabs* to color code form section tabs:
  - *Required* sections contain fields that must be complete and that have not been completed before the record can be saved.
  - *Complete* sections contain fields that must be complete and that have been completed.
  - *No Data* sections have optional fields, and no information has been added.
  - *Data* sections have optional fields, and information has been added.
  - Click a tab, select a color, then press **OK** to change the section tab color coding.
  - Check *Show required tabs in bold font* to boldface required section tab text.
  - Check *Show the active tab in bold font* to boldface the tab text for the currently active section. Option only available if *Show required tabs in bold font* is not selected.
- Check *Use color coding for fields* to color code form fields based on whether they are:
  - required but empty,
  - required and complete,
  - contain invalid information and cannot be saved, or
  - contain possibly invalid information but can be saved.
  - Click a field, select a color, then press **OK** to change the field color coding.
  - Check *Color checkboxes and option buttons* to color-code checkboxes.
- Press **OK**.

About Desktop Options

Specify the appearance of the FH desktop.

To Specify Desktop Options

- Select the **Tools** menu, **Workstation Options** option.
- Click the *General* tab, *Desktop* tab.
- Position cursor in the main area of the *Desktop* section and left mouse click, select a color, and press **OK** to change color of the FH workspace background.
- Select an image to display in the FH workspace:
  - Select from the standard graphics included with FH, or choose "Select...", highlight a graphic file then press **Select** to display a graphic of your choice in the FH workspace. You can also click the graphic displayed in the *Desktop* section to display a file dialog for selecting a different graphic.

- Check *Display status bar* to display the status bar at the bottom of the FH workspace.
- Check *Center forms on load* to open FH forms centered on the FH workspace.
- Check *Larger text for fields* to increase the size of text displayed in fields.
- Check *Picture Menus* to include icons for menu options when available.
- Check *Use Windows XP Theme* to use themes (only available for Windows XP).
- Press **OK**.

Specifying File Location Workstation Options

Unless you have a network installation, the directory information is defaulted to the proper location. The **Lookup** and **CAMEO®** directories are optional.

To Specify File Locations

- Select the **Tools** menu, **Workstation Options** option.
- Click the *Local Data & Files* tab.
- Press **Database** to specify the location of the database directory. The specified location will be used next time FH is accessed. If you are temporarily switching between databases, you should change the database directory via the **Login** form as you are accessing FH.

See the FH Help File "Select Directory" topic for information on selecting a directory.

- Optionally specify the lookup code table location. The lookup code tables are stored in the *Database* directory by default. Allow FH to manage this location unless you have specific reasons for doing otherwise. To specify:
  - Check *Use an alternate location for lookup tables...* to specify a directory for lookup code tables.
  - Press **Lookup**. The **Alternate Lookup Location** form is displayed.
  - Press **Lookup** and specify the location of the lookup directory, then press **OK**.
  - Press **OK**.
- Optionally specify where your CAMEO® data is stored. FH will use CAMEO data (not compatible with the CAMEOfm version) in chemical inventory records added for occupancy records. To specify location:
  - Press **CAMEO® Data**. The **Cameo Data** form is displayed.
  - Press **CAMEO Data**, specify location, then press **OK**.
  - Press **OK**.

- Press **System** to specify the location of the system directory. Workstation options are stored in the system directory.
- Press **Queries** to specify the location of the queries directory.
- Press **Reports** to specify the location of the reports directory.
- Press **Help** to specify the location of the online help directory. For optimal performance, FH Help must be installed to a location on C:\
- Check *Check for duplicate or misplaced tables or database on startup* to validate file locations.

See the FH Help File "Validate File Locations" topic for more information on using this utility.

- Check *Use transactions for data updates* to enable transaction processing. Transaction processing enables multiple system actions within FH to be treated as a single step, simplifying certain recovery procedures should errors arise. For example, if you modify values for several fields for an incident report the update is treated as a single transaction. If one of the values in the transaction fails to be saved, none of the other transaction values are applied. To optimize performance, leave this option disabled.
- Press **OK.**

To Enable Local Caching

- Select the **Tools** menu, **Workstation Options** option.
- Click the *Local Data & Files* tab.
- Check *Enable local caching of system and lookup tables*. This option allows you to copy the most up-to-date lookup codes and system database from a central location and use them locally. You will not be able to modify the lookup codes locally. DO NOT set this path to the root directory where FH is installed. It must be a sub-directory location (Example: C:\Program Files\FIREHOUSE Software\Cache\)
  - When *Enable local caching* is checked, press **Cache**, highlight the cache directory then press **OK**.
- Press **OK**.

Specifying Other Workstation Options

Other workstation options control report and query behavior, internet options, automated tasks, and journal and reminder options.

To Specify Report and Queries Options

- Select the **Tools** menu, **Workstation Options** option.
- Click the *Other* tab, then select the *Reports & Queries* tab.
- Check *Disable output to print* if you do not want reports and queries output to a printer at this workstation.

- Check *Disable output to file* if you do not want reports and queries output to file at this workstation.
- Check *Use Windows default* to use the printer set as the Windows default. Uncheck to select a printer for reports and queries that is not the Windows default printer.
- Select a **Report Layout/Preview Data** option to control what preview data is available while creating and modifying custom printed report forms:
  - Select *Prompt to allow user to enter parameter values* to prompt for parameter values when report layout is accessed. Press **Yes** to display the **Query Parameters** form, or **No** to load all possible records queried by the report.

NOTICE

You can limit the maximum number of records displayed when pressing **No** to prompt by temporarily selecting *Never allow user to enter parameter values*, specifying a maximum number, then selecting the *Prompt to allow user to enter parameter values* option.

  - Select *Always allow user to enter parameter values* to automatically display the **Query Parameters** form (when available).
  - Select *Never allow user to enter parameter values* to load all possible records queried by the report. The *Maximum number of records* value is respected if specified.
    - Uncheck *All* and specify a value to limit the maximum number of records displayed.
- Press **OK**.

To Specify Internet Options

- Select the **Tools** menu, **Workstation Options** option.
- Click the *Other* tab, then select the *Internet* tab.
- Check *Enable FIREHOUSE Software Internet Features* to enable internet features.
  - Select *Use FIREHOUSE Software web browser* to use an internal FH web browser when internet website links are activated within FH.
  - Select *Use the default web browser* to use the default workstation web browser when internet website links are activated within FH.
  - Check *Display hyperlinks underlined* to display internet and email addresses with an underline.
  - Select *Use FIREHOUSE Software email client* to use the FH email client for sending emails within FH.
  - Select *Use the default email client* to use the email client that is set up for this workstation whenever an email is originated within FH.

- Press **Email & FTP Defaults** to specify basic email and FTP information.
  - Complete applicable email and FTP fields.

Press **F1** with the form displayed to display additional information about available email and FTP options.

  - Press **OK**.
- Press **OK**.

To Specify Automated Task Options

- Select the **Tools** menu, **Workstation Options** option.
- Click the *Other* tab, then select the *Automated Task* tab.
- Specify automated tasks options. The task processor must be enabled for automated tasks to run. Select one of the following:
  - Select *Auto-Load on FIREHOUSE Software Startup* to enable the task processor when FH is opened.
  - Select *Auto-Load on Windows Startup* to enable the task processor when the computer is on. (Requires a workstation restart.)
  - Select *Disable Automated Task Processor* to disable the task processor.
- Optionally press **Setup Automated Tasks** to add/edit tasks.

The steps to setup automated tasks are detailed in the Advanced Feature Guide.

- Press **OK**.

To Specify Journal & Reminders Options

- Select the **Tools** menu, **Workstation Options** option.
- Click the *Other* tab, then select the *Journals & Reminders* tab.
- Check *Filter the journal and reminders forms to only display data relevant for this station*.

NOTICE
Filtering

When enabled, events associated with different stations are not included in the department journal or daily reminders, minimizing the amount of information that is sent. Enabling this option can significantly improve response times for departments with numerous stations, especially for workstations connected to an FH database using a low-speed connection.

- Check *Use Day Journal instead of Month Journal* to display the Department Journal form in "Day Mode". Departments with numerous events displayed may notice improved response using the Department Journal in Day mode.
- Press **OK**.

About Internal Messaging

Send messages to specific users/staff within FH. FH messaging creates multiple notes on save so they can be deleted individually. FH Internal Messages can be sent to all FH users, specific staff members by name/station assignment/rank/status (if a Staff ID is associated with an FH user login record), or specific users or user groups if you do not associate Staff ID with FH login records.

FH Messaging checks for unread messages at a user-defined interval and automatically displays a message when a message for the currently logged in user is received.

To Specify Internal Messaging

- Select the **Tools** menu, **Workstation Options** option.
- Click the *Other* tab, then select the *Internal Messaging* tab.
- Check *Enable Message Polling* and specify an interval in minutes to check for new messages at the specified interval.
- Press **OK**.

About Toolbars

Toolbars list commonly used options and access major data entry forms. You can modify toolbar appearance or add new toolbars.

To Customize Toolbars

- Select the **Tools** menu, **Workstation Options** option.
- Press **Customize Toolbars** to modify existing toolbars or add new toolbars. The **Customize Toolbars** form is displayed.

Press **F1** and review the "Customize Toolbars" topic in the FH Help File for step-by-step instructions for modifying and adding toolbars.

- Press **Close**.
- Press **OK**.

About Default Workstation Options

FH is sent out with default options. If you have experimented with workstation options and wish to return to the original workstation option configuration, you can do so.

To Reset Workstation Options Back to Default

- Select the **Tools** menu, **Workstation Options** option.

- Click the *General* tab, *Startup & Navigation* tab.
- Press **Reset Default**. All workstation options are returned to the original settings.
- Press **OK.**

Workstation Option Management

Workstation options can be applied to specified workstations from a central location. This allows an administrator to set workstation settings for networked workstations without physically accessing the **Workstation Options** form at each workstation. The workstation options can be applied to all workstations on the network, or only specific workstations.

To Apply Workstation Options to Selected Workstations

- Select the **Tools** menu, **Workstation Options** option.

> **NOTICE**
> Server Note
>
> *File Locations and Caching* and *Remote Access Configuration* should not be set from the server. Paths are local at the server location, so applying the local paths to network workstations would result in invalid paths.

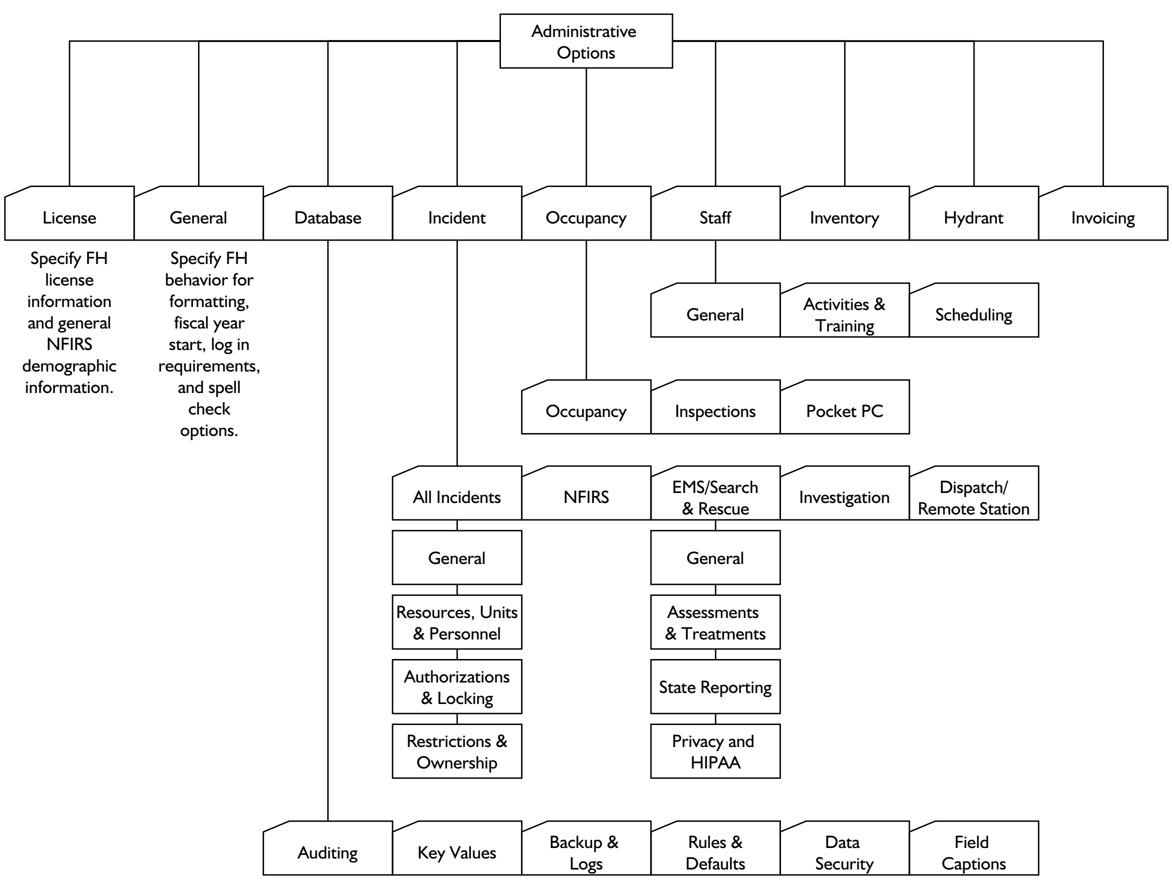
- Make changes to the **Workstation Options** form *General*, *Local Data & Files*, *Remote Data*, *Mapping*, *Pocket PC*, *Scheduling*, *Other* section and modify the toolbar. The settings you select will be applied to workstations specified in a later step.
- Press **Apply to All**. The **Workstation Settings Deployment Wizard** is displayed.
  - Check each area you wish to apply settings for, or press + and check a specific area option.
  - Press **Next>>**.
  - Check each workstation to apply settings to.
  - Check *Make these the default settings for new workstation that have not yet connected* to apply the selected settings to workstations added to your FH set up.
  - Check *Reset all default settings and toolbar for new workstations to FIREHOUSE Software defaults* to return all selected workstations to the FH default.
  - Press **Next>>**. A description of the settings that will be applied is displayed.
  - Press **Finish**.
- Press **OK**.

Chapter 4

Administrative Options

Administrative Options are program settings that adapt the program to your department's unique requirements. Certain settings should not be changed after data has been entered. Review the information in this chapter before you start entering live data.

Diagram: Administrative Options Form Sections



Specifying Administrative Options

Administrative options include important information about your installation of FH, and allows the administrator to specify FH behavior.

Specifying Licensing Administrative Options

NFIRS and EMS information is associated with *Station* lookup codes. At least one central station needs to be added before you can export incidents from FH. Department information needs to be added before department information can be exported to your state.

To Specify Department Information

- Select the **Administration** menu, **Administrative Options** option.
- Type the *Department/Agency Name* and *Number of Stations*.
- Optionally check *Use Division/Battalion* to use Divisions and or Battalions to group staff listed in the **Scheduling Console** form and specify whether "Battalion" or "Division" is the higher organizational unit.
- Add number of *Career Paid*, *Volunteer Paid*, and *Volunteer Not Paid* staff members.
- Type the *Chief's Name*.
- Type *System Administrator's Name* of the individual responsible for administrating the system. The name appears on error reports submitted to FH technical support.
- Press **OK**.

To Add Station

- Select the **Administration** menu, **Administrative Options** option.
- Press **Add**. The **Code for Stations** form is displayed.
    - Add details about the station. Be sure to designate individual stations with separate FDIDs as central stations if you will be submitting department information and incidents to the state for that FDID. The information you add is also added to the station lookup code, or you can select the station if it has already been added to the lookup.
    - Press **Save** to close the **Code for Stations** form.
- Press **OK**.

Specifying General Administrative Options

General administrative options control how dates and phone numbers are formatted, whether individual user preferences and macros are allowed, when your fiscal year begins, whether spell-check is automatically run, general security options and password complexity rules.

To Specify Date and Phone Number Formatting Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *General* tab.
- Specify **Formatting** area options:
  - Check *Use Windows Control Panel date format* to use the date format specified in Windows **Control Panel**.
  - Check *Show Century* to include the century (for example, 1999 instead of 99). This information is included in the underlying database regardless, but will not be displayed in data entry forms unless checked.
  - Specify *Date Format* (not available if you are using Windows date format). If available, select how dates are displayed throughout the system. "MM/DD/YYYY” will display April 1, 2004 as “04/01/2004”. “DD/MM/YYYY” will display April 1, 2004 as “01/04/2004”. “YYYY/MM/DD” will display April 1, 2004 as “2004/04/01”.
    - Select the *Date Delimiter* character used to divide date in the system. Select from three options: “/”, “-”, or “.".
  - Check *Auto-format phone numbers* to format phone numbers as *###-###-####* for ensuring consistency among phone numbers.

NOTICE
Phone Format

International users should disable this option if they do not use the *###-###-####* phone number format.

- Press **OK**.

To Specify Network & Multi-User Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *General* tab.
- Check *Attempt login from network identity* to automatically log into FH using your network identity. An FH login matching the network login must exist. This feature does not work on all network types.
- Check *Allow individual user preferences* to allow individual users to have their own unique desktop settings. When enabled, each user can define the settings normally specified from the **Workstation Options** form *General* section. User preferences (when enabled) are accessed from the **Tools** menu **User Preferences** option.

See "To Specify Startup Options", "To Specify Field Navigation Options", "To Specify Data Entry Form Options", "To Specify Tab & Field Coloring", and "To Specify Desktop Options" starting page 28 for details on available user-defined options.

- Check *Allow use of internal messaging* to allow users to create and send internal messages within FH to other staff members.
- Check *Allow individual user macros* to allow individuals to create and maintain their own user macros. A macro is a saved set of defined keystrokes that are launched by a user defined key combination.

See the FH Help file "Record Macro" topic for more information on creating macros.

- Press **OK**.

To Define Fiscal Year

- Select the **Administration** menu, **Administrative Options** option.
- Click the *General* section tab.
- Specify the *Month* that your fiscal year begins (if other than January).
- Specify the *Day* that your fiscal year begins (if other than 1).
- Press **OK**.

To Specify Spell-Checking Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *General* tab.
- Check *Auto spellcheck narratives/notes on save* if you want all notes and narratives in a record to be spell checked when you save the record.
- Press **Options** to set spell-checker settings.

See "Set Spell Checking Options" on page 234 for available options.

  - Press **OK**.
- Press **OK**.

To Specify Security Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *General* tab.
- Check *Require passwords* to require a password to access FH. We recommend that this option be enabled.
- Check *Allow workstation to be locked* to allow the **Lock Workstation** option (**File** menu, **Lock Workstation** option) to be used.
- Check *Inactivity timeout after* and specify the number of minutes for the program to timeout. When the program times out, you must enter a valid user name and password to reenter the program.

    - Select *Prompt for password reentry* to lock the workstation and require a password for reentry. The timed out FH occupies an FH license.
    - Select *Logoff user* to log the user out of FH. Unsaved changes are lost when the program times out. The timed out FH does not occupy an FH license.
- Check *Audit failed logins after* and specify a number of attempts to lock the program after a certain number of login attempts. If the number of attempts are exceeded, the program adds a failed login attempt to the audit log.
- Press **OK**.

To Specify Password Complexity Rules

- Select the **Administration** menu, **Administrative Options** option.
- Click the *General* tab.
- Check *Minimum length* then specify the shortest password allowed to require that passwords are a certain length.
- Check *Require change every* then specify the interval in days that users are required to change their passwords.
- Check *Must contain letters + numbers or special chars* to require that passwords include a combination of letters and numbers or special characters.
- Press **OK**.

Specifying Database Administrative Options

Database administrative options control database auditing, automatic numbering, backups, rules and security, and default values. Key values are record identifiers that uniquely identify a record. When you create a record, the key counter is the field that contains the value that identifies the record. The key counter can be generated by the system, or you can create it yourself. A specific key counter value can only be used in one record.

To Specify Database Audit Tracking Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Database* tab, *Auditing* tab.
- Check *Enable basic audit tracking*. This needs to be enabled if you use export to/import from station since it adds modified dates to records.
- Check *Enable detailed audit tracking* to enable audit tracking options. When checked, the following additional options are available:

- Select *Track changes to records* to track user name and date of all changes to records. Every time a record is saved, this option adds the user name and date to the list of changes made to the record.
- Select *Track changes to fields* and track user name, date, and fields changed.
- Select individual databases to track. For each listed database, a check in the box in the *Audit?* column indicates that the database audit tracking is enabled for the database (when *Track changes to records* is checked).

- Press **OK**.

To Specify Key Values Administrative Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Database* tab, *Key Values* tab.
- For each listed table:
  - Check *Auto-Gen?* to automatically generate the key counter when new records of the specified type are created.
  - *Table Name* is the name of the table the key counter is stored in.
  - *Field Name* is the name of the field the key counter is stored in.
  - Specify the *Key Format* for the key counter:
    - 'Numeric' only allows numbers.
    - 'Alpha-Numeric' allows a combination of letters and numbers (when selected, the key counter will use text from a key text field, and pad the remainder of the key counter with a number).
- Specify the *Key Length* of the key counter. A six character numeric key counter will look like "000001", while the same key counter value would look like "0000000001" if it were 10 characters.
- Press **OK**.

To Specify Backup and Log Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Database* tab, *Backup and Logs* tab.
- Check *Prompt to run a database backup upon logout every* to enable a prompt to back up FH database files. The interval is based on the number of days entered. When you exit FH, the number of days since the last backup is calculated and if it exceeds the number entered in days, you are prompted to create a new database backup.

See the FH Help File "Backup Database" topic for information on using the Backup/Restore Database feature.

- Check *Purge logs every* and specify the purge interval for available logs (the corresponding log is not purged if the value is '0'):
  - *Database Audit Log* is accessed from the **Administration** menu **Database Audit Log** option, then select the *Data* tab.

- *User Login History* is accessed from the **Administration** menu **Database Audit Log** option.
- *Automated Task Log* is accessed from the **Administration** menu **Automated Tasks** option, then select the *Log* tab.
- *External Data Import Log* is accessed from the **Administration** menu **Database Administration** option **Import from External Data Source** option, then select the *Log* tab.
- *PDA Import/Export* is accessed from the **Tools** menu **Pocket PC Tools** option **View Pocket PC Import/Export Log** option.
- *Export to Station Log* is accessed from the **File** menu **Station Management** option **Export to Station** option, then select the *Log* tab.
- *Import from Station* log is accessed from the **File** menu **Station Management** option **Import to Station** option, then select the *Log* tab.
- *Custom Data Export Log* is accessed from the **Administration** menu **Database Administration** option **Custom Data Export** option, then select the *Log* tab.

- Press **OK**.

To Specify System-Wide Requirements and Station Default

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Database* tab, *Rules & Defaults* tab.
- Select fields to require.
  - When a specific field name is checked, the field is required in all records that include the field. Press + to the left of the field name and records that use the field are listed.
  - Deselect specific records if the field should not be required for that record.
- Optionally add user-defined system rules and default values by pressing **System Rules & Default Values**. More information about adding user-defined system rules and default values is available in the Advanced Feature Reference.
- Select a **Station Default** value:
  - Select "Use the station where the workstation is physically located" to use the station specified in the **Workstation Options** form *General* section *Startup & Navigation* section for new occupancy inspection, equipment maintenance, staff availability, and hydrant activity records.
  - Select "Use the station from the associated master record" to use the station from the master record for new occupancy inspection, equipment maintenance, staff availability, and hydrant activity records.
- Press **OK**.

To Specify Administrative Data Security

- Select the **Administration** menu, **Administrative Options** option.

- Click the *Database* tab, *Data Security* tab.
- Check *Respect View Security and Privacy in Queries and Reports* to obscure values from areas that the user running a query or report does not have security access to. Calculated values and custom expressions and functions are not excluded regardless of the user's security.

NOTICE
Queries and Reports

If **Respect View Security and Privacy in Queries and Reports** is enabled via the **Administrative Options** form *Database* section *Rules and Security* section, protected information is masked in all queries and reports that do not include the record ID field regardless of the security level of the user. Include the ID fields for the following list of tables to use this feature:
EMS Patient, EMS_PTNT.PTNT_ID
Incident Arson Involvements, INC_ASUB.SUSP_ID
Incident Civilian Casualties, INC_CCAS.CAS_ID
Incident Fire Service Casualties, INC_FCAS.CAS_ID
Incident Involvements, INC_INVL.INVL_ID

- Check *Security Option for Attachments & Signatures* to require administrative access or specific user access to access.
  - For FH Enterprise systems only, check *Always store a copy of attachments on the server* to store attachments added to records in the FH database. Enabling this feature only effects attachments added after the feature is enabled.
- Press **OK**.

To Disable Batch Updating of Contacts

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Database* tab, *Data Security* tab.
- By default, when you modify a contact and other contacts in the record area exist, you are prompted to batch update all contacts to match the currently displayed contact. Check *Disallow batch updating of contacts* to disable this functionality.
- Press **OK**.

To Enable Append-Only Notes and Narratives

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Database* tab, *Data Security* tab.
- Select the narratives or notes fields to enable append-only for:
  - When a specific field name is checked, text can only be appended at the end of the narrative. Press + to the left of the field name and records that use the field are listed.
  - Deselect specific fields if append-only should not be required for that record.

- Press **OK**.

To Define Field Captions

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Database* tab, *Field Captions* tab.
- Select the field that you want to add a custom caption for:
  - Type the caption to use for the field on data entry forms in the **Field Label** area *Custom Value* field.
  - Optionally press **Apply custom text to all fields** to apply the custom field caption to all fields that have the same *System Default Description*.
  - When the selected field is lookup driven, you can also specify a custom lookup category description in the **Field Category Description** area *Custom Value* field.
- Press **OK**.

Specifying Incident Administrative Options

Incident administrative options control global incident requirements, NFIRS and EMS incident requirements, and Investigation requirements.

To Specify General Incident Requirements

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab, *All Incidents* tab, *General* tab.
- Check *Require narratives for all incidents* to make narratives required to complete incidents.
- Check *Require 911 used code* to make *911 Used Code* required to complete incidents.
- Check *Require a numbered or intersection address* to require a 'Street Address' or 'Intersection' address *Type* value (in the **Scene Address** area) for incident reports. When checked, 'Rural/Directions' and 'National Grid' address *Type* values are not allowed.
- Check *If both a NFIRS and EMS report exists, prompt to keep shared data elements synchronized* to prompt to synchronize shared NFIRS or EMS record data when saving a NFIRS or EMS incident record.
- Check *Allow scene/address data to be changed even if Occupancy ID is used* to allow occupancy information to be overwritten while entering incident reports. Departments that wish to update occupancy records as they are entering incident information (that is, using address information entered for the incident) select this option. You are prompted before any information is overwritten.

- Check *Do not search for an Occupancy ID matching the scene address* to disable the prompt displayed when entering an incident record with the same address as an occupancy record.
- Check *Use state-level validation rules* to use state-level validation, including relaxed address validation (cities and streets are not required to be in lookups) in incidents. Not recommended unless you are an incident collection agency.
- Check *Allow incomplete reports to be saved* to allow incident reports to be saved without being completed. Departments that do not complete incident reports at the time of entry select this option. When the incident is saved, a list of incomplete items is displayed, and if none of the items are critical, pressing Ignore All saves the incident. FH checks for incomplete status when printing reports or exporting reports to state.
- Specify *Numbering Reports:*
  - Select "YY-#######" to add the year from the incident date.
  - Select "#######" to disable the initial two optional characters in the incident number.
- Specify *Auto-Numbering Method*:
  - Select "Calendar Year" to use the calendar year for the two digits inserted into the incident number.
  - Select "Fiscal Year" to use the fiscal year for the two digits inserted into the incident number.
  - Select "None" to disable automatic numbering. Departments that do not wish to use the first 2 digits of the 7 digit incident number use this option.
- Press **OK**.

To Specify General Incident Resource, Units & Personnel Requirements

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab, *All Incidents* tab, *Resources, Units & Personnel* tab.
- Check *Require Resource detail (units and personnel)* to require units/personnel to complete an incident record. Select which resources to require:
  - Check *Require units* to require unit response detail records.
  - Check *Require personnel* to require participant detail records.
  - Check *Require personnel info for each unit* to require that each unit response detail record includes participant detail records.
- Check *Require detail if aid given or received* to require an aid given/aid received detail when mutual aid given or received is indicated in an incident report.

- Check *Require equipment usage detail* to require equipment usage details to complete incident reports. Equipment usage records for equipment records that have a unit associated with it are required. Additional usage records for other equipment used at the scene are optional.
- Check *Default times from previous entries for units and aid given/received detail records* to default times into new unit and mutual aid records.
- Check *Default actions taken for unit records* to add actions taken from the first unit response detail record to additional unit response detail records.
- Check *Default Fire, Medical, Rescue checkboxes in unit/personnel response based on incident type* to select the type.
- Check *Automatically calculate last unit cleared scene time on main report from unit entry* to complete the *Last Clr Scene* date and time on the **NFIRS Incident Report** form *Basic* section or the **EMS/Search & Rescue Report** form *Basic* section based on the latest *Cleared* date and time entered for responding unit detail records. Note that if you complete the *EMS/Search & Rescue* section of the **Unit Response Detail** form, the *Enroute to Dest* time is used instead of the *Cleared* time from the **Unit Response Detail** form *Basic* section.
- Check *Enable "Apply to All" option for fields during unit data entry* to allow information in unit response detail records to be applied to all other unit response detail records added for the incident.
- Check *Provide option to enter responding units & personnel from outside the incident report* to allow non-administrative users to add responding units and personnel to incidents via the **File** menu **Unit & Personnel Entry** option. When disabled, non-administrative users will not see the **Unit & Personnel Entry** option on the **File** menu.
- Press **OK**.

To Specify General Incident Authorization and Locking Requirements

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab, *All Incidents* tab, *Authorizations & Locking* tab.
- Check *Require Officer in Charge and Member Making Report authorizations* to require that Officer in Charge and Member Making Report authorization records be entered to complete the incident.
- Check *Require a Quality Control check authorization* to require a quality control check to save the incident.
- Check *Default the assignment field to the member's unit code* to add the staff member's unit to the *Assignment* field (from the staff member's responding personnel record if available, or the staff member's record) of the authorization record.

- Check *Automatically Lock Incident Reports* to restrict future incident report modifications using one of the options below. Otherwise, all users with “Modify” rights for the report can make changes. Departments that want to increase security on incident report entry use this option. Related staff activities are not locked.
  - Check *Allow only the user who entered the report* to restrict future incident report modifications to the person who initially entered the report or to administrators.
  - Check *Disallow changes after quality control check authorization has been entered* to lock incident reports after a report authorization record for quality control (QC) is entered.
  - Check *Disallow changes* and set the number of hours following incident completion before the incident is locked.
- Check *Lock Units & Personnel data entry if the incident report is locked* to lock unit and personnel response detail records related to an incident that is locked. When disabled, unit and personnel detail records for a locked incident can be modified by non-administrative users.
- Check *Unit information comes from CAD* to prevent non-administrative users from adding or editing responding units records to incident reports.
- Press **OK**.

To Specify All Incident Restrictions & Ownership Requirements

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab, *All Incidents* tab, *Restrictions & Ownership* tab.
- Check *Restrict view access to other user incident involvements* to add additional security to involvement records. When enabled, an additional security option for non-administrative users is added to allow the user to view involvement records added by different users.
- Check *Restrict view access to other users casualty reports* to add additional security to civilian and fire service casualty records. When enabled, additional security options for non-administrative users are added to allow the user to view civilian and/or fire service casualty records added by different users.
- Check *Automatically prompt to take ownership of unassigned records when record is selected for edit* to prompt the user accessing an incident created from external data (for example, an incident created from CAD data) to take ownership of the unassigned records.
- Press **OK**.

To Specify NFIRS Administrative Options

- Select the **Administration** menu, **Administrative Options** option.

- Click the *Incident* tab, *NFIRS* tab.
- Check *Require a NFIRS report for all incidents* to require a NFIRS incident for EMS incidents. Enabling this option ensures that NFIRS incident printed report statistics include all incidents run by your department.
- Check *Require Type of Alarm Code* to require *Type of Alarm* to complete an incident report record.
- Check *Require Vehicle/Extrication report for NFIRS incident types* and Type or look up the *Incident Type* code(s) to require the vehicle/extrication reports for.
- Check *Use abbreviated form when starting NFIRS report from EMS report* to display the **Initiate NFIRS Report** form when creating a new NFIRS incident report from the **EMS/Search & Rescue Report** form *Additional Reports* section.
- Check *Require Detail Loss & Value Report when total estimated loss on basic report > $0* to require a **Fire Loss & Value Report** if the entry in the *Estimated Dollar Loss* field in the **NFIRS Incident Report** form *Response* section is greater than zero.
- Check *Require Wildland Fire report for incident types 14x and 17x* to require a **Wildland Report** when the *Type of Situation Found* field on the **NFIRS Incident Report** form is “14x” (Wildland) or “17x” (Cultivated Crop/Vegetation).
- Check *Require HazMat Report for HazMat Release code 0 and applicable incident type* to require a **HazMat Report** when hazardous materials are indicated.
- Check *Require Arson report for Cause of Ignition 1 or Wildland Cause 7* to require an **Arson Report** when cause of ignition is “1”, or the cause entered in the **Wildland Fire Report** is “7”.
- Check *Provide the option to auto-generate the NFIRS incident narrative* to enable automatic NFIRS report narration.

More information on modifying and creating auto-narrative templates is available in the **Advanced Feature Reference**.

- Press **OK**.

To Specify EMS General Administrative Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incidents* tab, *EMS/Search & Rescue* tab, *General* tab.
- Check *Require EMS report for these NFIRS incident types* to require EMS incidents when NFIRS incidents with listed incident types are indicated. Press ... to display a list of available incident type codes.

NOTICE
Adding Additional Codes

When you press ... to add additional codes, the codes that have already been added are also selected. You need to press the `Ctrl` key before selecting additional codes to add the new code and keep the existing list intact.

- Check *Require Search & Rescue report for these NFIRS incident types* to require EMS incidents when NFIRS incidents with listed incident types are indicated. Press [...] to display a list of available incident type codes. See the above “Adding Additional Codes” notice before modifying this list.
- Check *Require Vehicle/Extrication report for NFIRS incident types or EMS Cause of Injury* to require a vehicle/extrication report for selected NFIRS incident types and/or if the cause of injury in the EMS incident indicates a vehicle accident or extrication. Use the [...] buttons to add incident type codes or cause of injury codes. See the notice “Adding Additional Codes” before modifying this list.
- Check *Require specific Injury/Illness codes* to require injury/illness details if an injury or illness is indicated in the patient record.
- Check *Require Injury Matrix if injury* to require the injury matrix if an injury is indicated in the patient record (if applicable).
- Check *Provide the option to auto-generate the EMS scene/patient narrative* to enable automatic EMS scene/patient report narration.

More information on modifying and creating auto-narrative templates is available in the **Advanced Feature Reference**.

- Press **OK**.

To Specify EMS Assessments & Treatments Administrative Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab, *EMS/Search & Rescue* tab, *Assessments & Treatments* tab.
- Check *Require a Vitals/Assessments record* to require patient vitals or assessment records for each patient. “Not Assessed” and “Not Applicable” are options.
- Check *Require a Procedure record* to require a patient medical procedure record for each patient. “None” and “Not Applicable” are options.
- Check *Require a Medication record* to require a patient medical medication record for each patient. “None” and “Not Applicable” are options.
- Check *Disallow auto-time increment options during vitals, procedures and meds data entry* to disable the ability for automatic time incrementing to be used. Select this option if data entry personnel are not likely to verify times entered for vitals/procedures/medication records.
- Check *Default auto-time increment* and specify the *Default auto-time increment*. When enabled, adding a vitals/procedure/medication record adds the most recent time from the most recent vitals/procedure/medication time plus the specified number of minutes. Not available if *Disallow auto-time increment options during vitals, procedures and meds data entry* is enabled.
- Specify *EMS Vitals/Blood Gas Measurement:*

    - Select *Use Sp02 (%)* to track a percentage. Most departments do not collect arterial oxygen percentage (requiring a highly specialized tool and generally represented as Sp02).
    - Select *Use Pa02 (mmHg)* to track Pa02 in mmHg units.
- Specify *EMS Vitals/Temperature Measurement:*
    - Select *Use Fahrenheit* to track temperature in Fahrenheit.
    - Select *Use Celsius* to track temperature in Celsius.
- Press **OK**.

To Specify EMS State Reporting Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab *EMS/Search & Rescue* tab, *State Reporting* tab.
- Press **Change EMS Code Set** to specify active EMS code set.

See the "Select Active EMS Code Set" in the **FH Help File** for details about available EMS code sets.

- Check *Generate Patient Lithocode Values* and specify a *Start* and *End* range if your state requires a unique lithocode for each patient. *Lithocode* is listed on the **Patient/Victim Information** form *Other* section after the patient record is saved.
- Check *Require Crew Member Numbers* to require that crew numbers be assigned to staff performing assessments or procedures. Assign crew via the **Patient/Victim Information** form *Other* section by pressing **Assign Crew Member Numbers**.
- Specify NEMSIS reporting requirements (NEMSIS EMS Code Set must be installed):
    - Check *NEMSIS - Export only data elements required for the national database* to only include the NEMSIS elements required for the national database. When not enabled, all NEMSIS elements are included.
    - Check *NEMSIS - include patient confidential information in export* to include confidential patient information like name, social security number, etc. in the export.
    - Enter or lookup an inventory class code (if the Inventory module is enabled) for *Medical Devices Inventory Class* to set the inventory class code identifying NEMSIS medical inventory items.
- Press **OK**.

To Specify EMS Privacy and HIPAA Tracking

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab *EMS/Search & Rescue* tab, then click the *Privacy and HIPAA* tab.
- Type or look up a printed report form to use when printing from the **HIPAA Status** form.

- Check *Display the patient narrative in the patients list of the main report* to display the patient narrative in the **EMS/Search & Rescue Report** form *Patients/Victims* section when the patient record is highlighted.
- Check *List all matching patient names when starting a new patient record* to display matching patients after adding the patient last name to a new patient record even if the current user does not have the rights to see patient information. Administrative users will not be affected.
- Press **OK**.

To Specify Investigation Administration Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab, *Investigation* tab.
- Check *Default the Investigation ID to Incident Number when linking to an incident report* to use the *Incident Number* value for the *Investigation ID* for investigation records created from an incident.
- Check *Lock the investigation report when it is linked to a locked incident* to require administrative security to modify investigation records linked to a locked incident.
- Press **OK**.

To Specify Dispatch/Remote Station Administration Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Incident* tab, *Dispatch/Remote Station Report* tab.
- Check *Require incident completion times for remote response reports* to require that *Arrival*, *Cleared*, and *Back in Svc* time values be added for unit response detail records added to dispatch/remote station incident reports.
- Check *Warn if the following fields are not specified when entering an EMS patient dispatch report* to require values for *Unit Notified*, *Unit Enroute*, *Arrived Scene*, *Cancelled Date/Time* (if applicable), *Cleared Scene*, *Mechanism of Injury/Nature of Illness*, *Provider Impression*, *Initial Level of Provider*, *Injury/Illness*, and *Back in Service* in EMS patient records added from the **Dispatch/Remote Station Incident Report** form.
- Check *Provide the option to auto-generate the Dispatch/Station narrative* to allow Dispatch/Station narratives to be generated.

More information on modifying and creating auto-narrative templates is available in the **Advanced Feature Reference**.

- Press **OK**.

Specifying Occupancy Administrative Options

Occupancy administrative options control occupancy record behavior and allows the violation code set to be selected.

To Specify Occupancy Master Administrative Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Occupancy* tab, *Occupancy* tab.
- Check *Prompt to add history records when name or building info changes* to prompt to add a history record when occupancy record values are changed and the record is saved.
  - Specify a *Default Code* value to automatically default an *Occupancy History* code for occupancy history records created when prompted following a change.
- Check *Prompt to update all occupancies when primary occupancy building information changes* if you want to be prompted to update all occupancies that share the *Property ID* when the primary occupancy for the *Property ID* is modified.
- Press **OK.**

To Specify Inspections Administrative Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Occupancy* tab, *Inspections* tab.
- Type or look up the violation code set to use for reporting inspection violations in the **Inspection Violation Codes** area. There are specific violation codes formatted for use in FH available.
- Check *When saving an inspection, prompt to create a future scheduled inspection* to add scheduled inspections after completing inspections.
  - Select *Only if there are violations flagged for recheck* to only create future inspections in specific instances.
  - Select *When an inspection is completed, regardless of whether there are violations* to always prompt to create a future inspection.
- Check *Prompt to print a violation notice if violation records exist when an inspection is saved* if you generally print violation notices after entering an inspection into FH.
- Press **Update Inspection Checklist Items** to add inspection checklist items to the **Inspection Checklist Report** form.
- Press **OK.**

To Specify Pocket PC Administrative Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Occupancy* tab, *Pocket PC* tab.

- Type the signature header text, following the instructions on the form.
- Select the query used to select occupancies or inspections exported to FH Onsite Inspections:
  - Select "Occupancy Master Queries" or "Inspection Queries" and leave the *Select Query* field blank to use the default query for the selected category.
  - Specify a specific query to use that query to display occupancies/inspections during FH Onsite Inspections export. You will not be able to change the query used to display occupancies/inspections when exporting.
  - Optionally check *Allow user to select a different query* to allow a query to be selected when exporting to FH Onsite Inspections.
- Press **OK**.

More information on Pocket PC options is included in the **Onsite Inspections Installation and Introduction Guide**.

Specifying Staff Administrative Options

Staff administrative options control general staff record behavior, the default staff group select method, and the display format for hours on printed reports. You can also setup the LOSAP values used in the LOSAP report.

To Specify Staff Administrative General Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Staff* tab, *General* tab.
- Specify the *Default Staff Group Select Method* for selecting responding personnel groups (for example, when **Add Group** is pressed from a staff activity):
  - "Station Roster" lists available personnel based on the station roster.
  - "Staff Master Record (Criteria)" lists available personnel based on the criteria listed in the Staff Group Select form.
  - "Saved Groups" to list available personnel based on a saved group you select.
- Select the method for *Default Station, Shift and Unit in Activities, Training, and Scheduling* for defaulting values in records:
  - Select "Use the default station, shift and unit from the activity, training or schedule record" to apply the default values for the master activity/training/schedule record to the detail record.

- Select "Prompt to replace with the station, shift and unit from the staff master record if specified and different" to prompt the user to choose between the default *Station/Shift/Unit* value or the *Station/Shift/Unit* value associated with staff member record when the values are specified in the staff member record and are different than the defaults in the activity/training/schedule record.
- Select "Always default the station, shift and unit from the staff master record if specified" to use the *Station/Shift/Unit* value from the staff member's record if available without prompting the user. The *Station/Shift/Unit* defaults from the activity/training/schedule record is used if a *Station/Shift/Unit* value is not specified in the staff member record.

- Check *Prompt to add history record when rank, status or hire date changes* to prompt to add a history record when a staff member's *Rank*, *Status*, or *Hire Date* are changed and the record is saved.
  - Specify a *Default History Code* value to automatically default a *Staff Member History* code for staff history records created when prompted following a change.
- Press **OK.**

To Setup LOSAP Values

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Staff* tab, *General* tab.
- Press **Setup LOSAP Values** to set up values to use for the Length of Service Awards report. Press F1 to display the 'Setup Length of Service Awards (LOSAP) Report Setup' topic for more information.
- Press **OK**.

To Specify Staff Administrative Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Staff* tab, *Activities & Training* tab.
- Select *Activity and training hours printed format*. This controls the activity and training activity hours on printed reports only. All time values in FH data entry forms are decimal only.
  - "Display as a decimal number" displays hours in decimal format. For example, 1 hour and 30 minutes is displayed as 1.5 hours.
  - "Display as hours, minutes" displays hours and minutes. For example, 1 hour and 30 minutes is displayed as 1:30.
- Check *Auto-Calculate activity & training hours paid from start and end date/time* to calculate and insert activity and training hours for new records (*Hours Paid* and *Hours Worked*).

- Check *Prompt to confirm times used in calculating hours worked when adding new activity from incident report* to display a form for specifying the activity start date and time, and the activity end date and time, when adding staff activities from incident records. The elapsed time is used in *Hours Paid*.
- Optionally select *Except for the listed codes, warn if hours are entered for absent staff members on* options:
    - Check *Activity Codes...* to warn when hours are entered for a staff participant detail when *Attendance Status* indicates an absence.
    - Check *Training Categories...* to warn when hours are entered for a staff participant detail when *Attendance Status* indicates an absence.
- Optionally complete Public Education/Service area requirements for Staff Activity records:
    - Check *Require public attendance numbers for the following activity codes* and specify the activity codes to require attendance numbers for (included in the **Staff Activity** form *Public Education/Service* section).
    - Check *Hide fields for public service (smoke detectors and safety seats installed)* to remove the Public Service area fields from the **Staff Activity** form *Public Education/Service* section.
- Optionally require that all rating bureau information be completed to complete a training record by checking *Require responses for all rating bureau criteria codes*. Rating bureau criteria are added via the **Training Class** form *Rating Bureau* section.
- Press **OK.**

To Specify Staff Administrative Scheduling Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Staff* tab, *Scheduling* tab.
- Check *Automatically lock duty activities created through scheduling* to prevent non-administrators from modifying staff activity records created through scheduling.
- Check *Only allow updates to staff shift and station from scheduling* to only allow the *Station/Shift* values for a specific staff member to be changed in the staff member's duty cycle record. When enabled, the *Station/Shift* value can not be modified from the Staff record.
- Press **OK.**

Specifying Inventory Administrative Options

Inventory administrative options prompt to add maintenance records when a *Staff ID* is added or changed for a 'Personal Protective Eqpt' type inventory record.

To Enable Maintenance Prompt for PPE Type Inventory Records

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Inventory* tab.
- Check *Prompt to add maintenance record when Staff ID is added or changed for PPE type inventory.*
- Specify the *Default Job* code to use in the maintenance record created when the *Staff ID* is added or changed in a 'Personal Protective Eqpt' type inventory record and you answer **Yes** to prompt.
- Press **OK**.

Specifying Hydrant Administrative Options

Hydrant administrative options are designed to prompt to add records when hydrant status is changed, and to set the flow test calculation method desired to use.

To Specify Hydrant Administrative Options

- Select the **Administration** menu, **Administrative Options** option.
- Click the *Hydrant* tab.
- Check *Prompt to add record when in/out of service status changes*. System codes for IN service and OUT service will automatically be selected.
- Select the drop-down arrow to choose the appropriate **Hydrant Flow Test Equation** used by the department. If the specific equation is not listed, and the equation is available to the department, select *Custom* to enable the fields for expression entry.
- Press **OK**.

Specifying Invoicing Administrative Options

The optional FH Accounts Receivable module includes several administrative options. For more information on FH Accounts Receivable, see the FH Accounts Receivable Installation and Introduction Guide.

Chapter 5

Users and Security

To access FIREHOUSE Software, you must have a user name and a password. Security is enabled by controlling the access of each user to specific areas.

Security serves two primary functions:

- Selective access to specific areas
- Maintain record modification history

Each user does not need access to all areas. Selective access helps assure appropriate confidentiality of sensitive information and minimizes potential administrative problems. For example, most users do not need access to staff member administrative information. You also do not want to allow all users to perform administrative actions that could impact the system. Designing security based on the individual and their responsibilities is the best way of minimizing security breaches. When you tailor specific users' access to the areas and features they need to perform their tasks within FH, you reduce the number of things they can do wrong (intentionally or unintentionally).

Another issue to consider is the ability to track specific user activity within FH. When a specific user is logged in, that user name is tied to record entries or modifications. If a Staff ID is associated with the user setup, the staff member's name can be associated with the user name. If questions arise about a specific record, you can access record entry information and determine who created the record and who last modified the record. If user names are shared by multiple users there is no way to determine who actually created or modified the record.

We recommend setting up a login name and password for each user. The password should be limited to 10 characters or less. You can limit their usage level by designing the security based on the individual. Any other approach potentially disables the built in record modification tracking and/or permits security breaches.

Specifying User Security

FIREHOUSE Software includes a default user with the highest security access. (User Name = **GUEST**, Password = **DEMO**). When you add your own administrative users, consider disabling the default **GUEST** user since it is a potential security breach.

About Users

You can add many different users, each with their own security levels. Note that the record modification history will not identify specific individuals unless user names are set up for each user.

To Add Administrative User

Do not lose the administrative account user names and passwords. These should be stored in a secure location.

- Select the **Administration** menu, **Users and Security** option. The **Users and Security** form is displayed.
- Press **New**. The **User Setup** form is displayed with the cursor in the *User Name* field.
- Type the user name, then press **Enter**.
- If passwords are required via the **Administrative Options** form *General* section, press **Set Password**, type the password for the user in the *Password* field, then type the password again in *Confirm Password*, then press **OK**. Certain password complexity requirements may also be specified in the **Administrative Options** form.

See ‘To Specify Security Options’ on page 42 for the steps to require a password and to specify password complexity requirements.

- Press **Link to Staff ID** to associate the login with a specific staff member. When a *Staff ID* is associated with a login, you can add staff name to reports and queries that include user records.
- Type or look up an *FDID* associated with the user.
- Check *Full Administrative Access* to give the user complete rights to the program, including the ability to modify their own rights. Administrative access provides complete access to all areas of the system, so no further security definitions are required.
- Specify what form is automatically loaded when this user logs into the system in *Auto-Launch Form on Login*, or leave as **<None>** to display the FH desktop after login.

- Check *Require Password Change (Next Login)* to prompt user to supply their own password next time they log in.

The user name and password is ready to be used to access FH. Save and close the **User Setup** form, then add additional users or exit the **Users and Security** form.

To Add Administrator's Helper User

An administrator's helper can access other user's login records to change the user's password. Administrator helper access does not provide any other administrative access and additional module security must still be assigned.

- Select the **Administration** menu, **Users and Security** option. The **Users and Security** form is displayed.
- Press **New**. The **User Setup** form is displayed with the cursor in the *User Name* field.
- Type the user name, then press **`Enter`**.
- If passwords are required via the **Administrative Options** form *General* section, press **Set Password**, type the password for the user in the *Password* field, then type the password again in *Confirm Password*, then press **OK**. Certain password complexity requirements may also be specified in the **Administrative Options** form.

See "To Specify Security Options" on page 42 for the steps to require a password and to specify password complexity requirements.

- Press **Link to Staff ID** to associate the login with a specific staff member. When a *Staff ID* is associated with a login, you can add staff name to reports and queries that include user records.
- Type or look up an *FDID* associated with the user.
- Check *Change other non-admin passwords*.

Add additional rights just like any other non-administrative user. See 'To Add Non-Administrative User', below, for the steps.

To Add Non-Administrative User

- Select the **Administration** menu, **Users and Security** option. The **Users and Security** form is displayed.
- Press **New**. The **User Setup** form is displayed with the cursor in the *User Name* field.
- Type the user name, then press **`Enter`**.
- If passwords are required via the **Administrative Options** form *General* section, press **Set Password**, type the password for the user in the *Password* field, then type the password again in *Confirm Password*, then press **OK**. Certain password complexity requirements may also be specified in the **Administrative Options** form.

See ‘To Specify Security Options’ on page 42 for the steps to require a password and to specify password complexity requirements.

- Press **Link to Staff ID** to associate the login with a specific staff member. When a *Staff ID* is associated with a login, you can add staff name to reports and queries that include user records.
- Type or look up an *FDID* associated with the user.

NOTICE
User Groups

If this user will be a member of a group that shares similar rights, you can save the user now, add a group, then add this user to the group. For example, add a group called **`Inspector`** and assign users that need complete access to occupancy and hydrant information.

- **Group Memberships** lists available groups that include security rights defined for the group. Add the rights of the group to the profile by checking to the left of the group name.

See “Add Group”, Setup 68, for steps to add a group.

- Complete remaining user security options for non-administrative access users:
  - Check *Customize Workstation Options & Toolbars* to allow the user to modify workstation options, and to add, edit, or modify toolbars. The **Workstation Options** form is accessed from the **Tools** menu.
  - Check *Change Password* to allow the user to modify their own password. The **Change Password** option is included in the **Tools** menu.
  - Check *Update SpellCheck Dictionaries* to allow the user to add words to the spell check dictionary and modify word-replace options.
  - Check *Create Memorized Template Records* to allow the specified user to create new memorized templates.
  - Check *Create or Modify Queries* to allow the specified user to create or modify queries. Queries are used for browse lists, graphs, and reports.
  - Check *Create or Modify Reports, Graphs, or Maps* to allow the specified user to create or modify reports, labels, or graphs.
- Specify what form is automatically loaded when this user logs into the system in *Auto-Launch Form on Login*, or leave as **<None>** to display the FH desktop after login.
- Check *Require Password Change (Next Login)* to prompt user to supply their own password next time they log in.
- Save and close the **User Setup** form, then add additional users or exit the **Users and Security** form.

You should assign module rights for each user.

To Assign Module Rights for User (Non-Administrative Users)

- If the **Users and Security** form is not already displayed, select the **Administration** menu, **Users and Security** option, select the non-administrative user to modify, then press **Properties**.
- Click the *Modules* tab.
- Specify which modules the user can access, and the user's rights in the modules they have access to. Specify user rights by clicking on the appropriate boxes (add/allow, edit, delete, view, or lock). You can select combinations of these rights.

Add or Allow						
Add	**Allow**	**Edit**	**Del**	**View**	**Lock***	**Override Append**
User can create a new record in the selected area.						
	User can perform the selected option.					
		User can change and save records in the selected area.				
			User can delete records in the selected area.			
				User can view records in the selected area.		
					User can lock records in the selected area.	
						User can override appended notes and narratives when 'append only' is enabled via the **Administrative Options** form *Database* tab, *Data Security* tab.

NOTICE

"View" Rights

"View" rights are assigned when any other rights are assigned. Removing "View" rights removes all other rights in the selected area.

* Rights can be assigned to allow a non-administrative user to override record locks.

- If this user does not need access to lookup tables, distinct value lookups, or add-ons, the user name and password is ready to be used to access FH. Save and close the **User Setup** form, then add additional users or exit the **Users and Security** form.
- If this user needs access to lookup tables, distinct value lookups, or add-ons, you should assign these rights for the user.

To Assign Lookup Tables for User (Non-Administrative Users)

- If the **Users and Security** form is not already displayed, select the **Administration** menu, **Users and Security** option, select the non-administrative user to modify, then press **Properties**.
- Click the *Lookup Tables* tab.
- Press *Allow All* to allow access to all lookup categories.
- Press *Restrict All* to restrict access to all lookup categories.

- Select a specific lookup table to assign rights to the table. When you select a specific lookup table, you are prompted to specify access to subcategories.
  - Select *Yes* to grant access to all subcategories and No to restrict access. When access to a specific lookup table or lookup category is restricted, the user can not add, edit, delete, or merge lookup codes for the restricted lookup categories.
- If this user does not need access to distinct value lookups, or add-ons, the user name and password is ready to be used to access FH. Save and close the **User Setup** form, then add additional users or exit the **Users and Security** form.
- If this user needs access to distinct value lookups, or add-ons, you should assign these rights for the user.

To Assign Distinct Value Lookups for User (Non-Administrative Users)

- If the **Users and Security** form is not already displayed, select the **Administration** menu, **Users and Security** option, select the non-administrative user to modify, then press **Properties**.
- Click the *Distinct Value Lookups* tab.
- Press *Allow All* to allow access to all lookup categories.
- Press *Restrict All* to restrict access to all lookup categories.
- Select a specific distinct value lookups to assign rights to the category. When you select a specific category, you are prompted to specify access to subcategories.
  - Press **Yes** to grant access to all subcategories and **No** to restrict access. When access to a specific category is restricted, the user can not add, edit, delete, or merge distinct lookup values for the restricted categories.
- If this user does not need access to add-ons, the user name and password is ready to be used to access FH. Save and close the **User Setup** form, then add additional users or exit the **Users and Security** form.
- If this user needs access to add-ons, you should assign these rights for the user.

To Assign Add-Ons Security for User (Non-Administrative Users)

- If the **Users and Security** form is not already displayed, select the **Administration** menu, **Users and Security** option, select the non-administrative user to modify, then press **Properties**.
- Click the *Add-Ons* tab.
- Check each installed add-on to enable the user to run the add-on.
- Press **Save** to save the user setup and return to the **Users and Security** form. You can add additional users or exit the **Users and Security** form.

To Assign Custom Queries/Reports/Graphs/Maps Categories Security

- If the **Users and Security** form is not already displayed, select the **Administration** menu, **Users and Security** option, select the non-administrative user to modify, then press **Properties**.
- Click the *Queries & Reports* tab.
- Change *Show Category Security for* option to show Queries, Reports, Graphs, or Maps.
- Select the categories to assign rights to.
- Press **Save** to save the user setup and return to the **Users and Security** form. You can add additional users or exit the **Users and Security** form.

To Disable User Login

- Select the **Administration** menu, **Users and Security** option. The **Users and Security** form is displayed.
- Select the user or users (multiselect is enabled) to disable, then press **Disable**. When a user profile is disabled, the user name and password can not be used to access FH and the user is not listed in the **Users and Security** form unless *Show Disabled User Accounts* is checked.
- Press **Close**.

To Enable Disabled User Login

- Select the **Administration** menu, **Users and Security** option. The **Users and Security** form is displayed.
- Check *Show Disabled User Accounts*.
- Select the disabled user or users (multiselect is enabled) to modify, then press **Enable** to enable selected user(s).
- Press **Close**.

To Require User Password Change

- Select the **Administration** menu, **Users and Security** option. The **Users and Security** form is displayed.
- Select the user or users (multiselect is enabled) to require a password change for, then press **Req Pwd Chg** to require the user(s) to specify a new password next time they login to FH.
- Press **Close**.

Specifying Groups

User Groups are security access definitions that can be set up and applied to individual users. User groups can speed user setup, since you can define the security for a large group of users, then add users to the group with a single mouse click.

To Add New Group

- Select the **Administration** menu.
- Select **Users and Security**. The **Users and Security** form is displayed.
- Press the *User Groups* tab.
- Press **New**. The **User Group Setup** form is displayed with the cursor in the *Group Name* field. The default information is displayed in the *Group Name* field. These groups can be modified to fit your needs or new ones can be created.
- Type a *Group Name* that describes the group. All users that have been added are listed in **Group Members**.
- Type or look up an *FDID* associated with the group.
- Check the box preceding the user name to add the user to the group (the selected user will be given the same rights as the group).

  Specifying rights is the same for groups as it is for individual users.

See the steps for specifying security on page 62.

To Assign User to Existing Group

- Select the **Administration** menu.
- Select **Users and Security**. The **Users and Security** form is displayed.
- Select user(s) to add to a group.
- Press **Add to Group**. Available groups are listed.
- Select group.
- Press **Close**.

Reviewing User Activity

A log of each user's access history is available.

To Review Log of User Accesses

- Select the **Administration** menu, **Users and Security** option. The **Users and Security** form is displayed.
- Select the user, then press **Properties**.

- Press **View Login Info**. A listing of past accesses by the user are listed.
- Press **OK** when finished.
- Save and close **User Setup** form when finished.

To Review Current User Information

- Select the **Tools** menu, select **Display Current User Info** option. The **Current User Info** form is displayed. Press **F1** for more information on form options.
- Press **OK** when finished.

Chapter 6

Concepts

This chapter lists basic FH features designed to simplify data entry.

The Installation and Evaluation Guide contains basic information for familiarizing yourself with the program.

Getting Around in Forms

Below are simple guidelines for getting around in FH forms.

- Press **Tab** to move to the next field or command button. To move to the previous field use the command button or press **Shift+Tab**.

NOTICE
Data Grids

Data Grids (for example, phone numbers and emails) are an exception. The keyboard key for "tabbing" through a data grid is **Ctrl+Tab**.

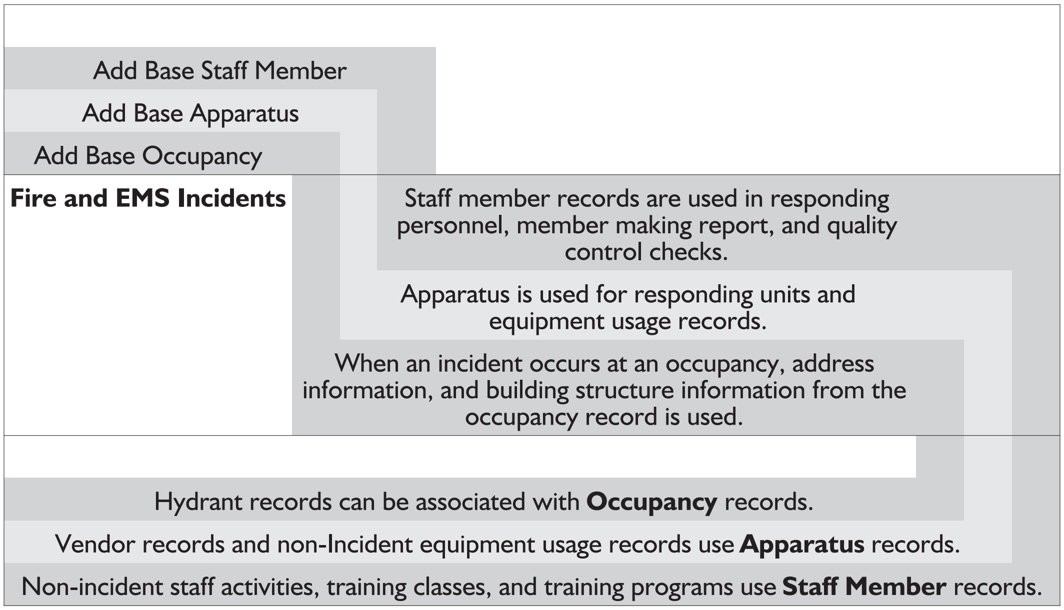
- Point the mouse cursor and press the left mouse button (left-click) on a command button to perform the button command (for example, Save command buttons save the information on the form). You can also press the **Enter** keyboard key when a command button is highlighted to perform the button command.

See the FH Help File "keyboard shortcuts" topic listed in guide index for a list of keyboard shortcuts.

- Press the right mouse button (right-click) with the cursor to display a menu of options. Available options vary depending on where the cursor is positioned when the right button is pressed.
- Pressing the **Esc** key on the keyboard is like pressing the Cancel button on a form.

Understanding Record Entry Order

FH is an integrated package that shares information between modules. Entering records in a specific order can help save time when all modules are installed.



If your version does not include records listed above and you wish to add the capability of tracking these records, contact your sales representative listed in the inside cover of this guide for more information and pricing for additional modules.

How Information is Stored

Information you add to FH is stored in records. A record is a collection of fields that is uniquely identified by a key field. For example, a staff record includes (at a minimum) the following fields:

Staff ID	Key field that uniquely identifies the record.
First Name	Staff member's first name.
Last Name	Staff member's last name.
Status	Status code for the member.

The *Staff ID* is the key field that uniquely identifies specific staff members.

NOTICE
Required Fields

There are many different types of records in FH. All records have a set of fields that must have values for the record to be saved. When records are added, the required fields must be completed or you are prompted to add the missing information. By default, these required fields are color coded to indicate their requirement and completion status.

Selecting and Browsing Records

You select the records you wish to make available for browsing, then open the first record in the list. The browse buttons at the bottom of the form are inactive when only one record is opened.

To Open Multiple Records

To open multiple records for browsing, complete the following steps (using Fire Incidents as an example):

- Press . Depending on **Administrative Options**, the **Incident Report** form or the **Query** form is displayed. If the **Incident Report** form is displayed, press **Browse.**
- To select two records next to one another, position the cursor over the first record then press the left mouse button (highlight), press and hold the **`Shift`** key, then highlight the second record. All records between the first and second highlighted record are selected. Release the **`Shift`** key, then press **OK**. The first record is opened and other selected records can be displayed using the navigation buttons at the bottom of the form.
- To select multiple records that are not next to one another, highlight one record, press and hold the **`Ctrl`** key, then locate and highlight the next record. Repeat for all records you wish to open, release the **`Ctrl`** key, then press **OK**. The top record is opened and other selected records can be displayed using the navigation buttons at the bottom of the form.

Chapter 7

Staff Activity & Training

Staff Activity and Training includes staff records, staff activities, training classes, and training programs.

Staff Records

Staff records includes basic information about the staff member and is also used to associate specific staff members with department activities, equipment master records, and many other detail records such as occupancy inspections, and hydrant flow tests.

At a minimum, you should add base staff information for every staff member who will respond to incidents.

To Add New Staff Record

- From the **File** menu, select the **Staff Members** option.
  - If the Staff form with the last modified record is opened, press **New** (or `Ctrl + N`) to add a new record
  - If a blank **Staff** form is opened, you are ready to enter a new staff member.
  - If the default query for selecting staff records is displayed, press **Cancel**.
- Type the staff member's ID in *Staff ID*, or press the `Tab` keyboard key to have FH automatically assign an ID (if enabled from the **Administration** menu, **Administrative Options** option in the *Database* section *Key Counters* section).

NOTICE Staff ID

Staff ID should ***not*** be based on information that will change over time. If there is a department assigned ID that changes over time (for example, a code based on rank) use the *Alternative ID* field to track this department assigned ID.

- Type an *Alternate ID*. This is a secondary ID that can contain additional identification information for the staff member.
- Type the number of miles this staff member lives from their station in *Miles to Station*.
- Complete address information as needed.

NOTICE Group Select Criteria

Group select forms used to select multiple staff members (for example, members that respond to incidents) include criteria fields used to filter the list of available staff members to display all staff associated with specific criteria. *Station*, *Shift*, and *Unit* are examples. When *Station*, *Shift*, or *Unit* fields for the staff member record are left blank, the staff member will still be included in the *Group Select* list even if a specific station, shift, or unit criteria is specified in the group select (since the member could be assigned to the *Station*, *Unit*, or *Shift*). If values are entered in the staff member's *Station*, *Shift*, or *Unit* field and station, shift, or unit criteria is specified for the group, the staff member is not included in the list unless station, shift, or unit criteria match the values in the staff member's record.

- Type or look up the *FDID* the staff member is associated with.
- Type or look up the *EMS Service#*.
- Type or look up the *Station* and *Shift* the staff member is assigned to.
- Type or look up the *Unit* code the staff is assigned to (if the staff member is assigned to a single unit).
- Type or look up *Rank* and *Effective Date*. Rank is not included in group select criteria.
- Type or look up *Status* and *Effective Date*. Status is typically used to distinguish between inactive, volunteer, part-time and full-time employees.
- Type or look up *Date of Birth*, *Hire Date*, *Adjusted Hire Date*, and if the staff member is no longer in service, *End Service Date*. *Adjusted Hire Date* can be used to reflect when a designation took effect.
- Optionally add **Other Stations** to include the staff member when adding staff groups using the additional station values as criteria.
- Add phone number and emails as needed:
  - Press [+] then enter the staff member's published *Phone Numbers Type*, *Phone Number*, and *Extension*.
  - Click the Email/Internet Addresses tab, then press [+] and enter the staff member's email *Address*.
- Add additional information as needed, then save and close record.

About Staff Contacts

Add individuals that can be contacted regarding each staff member (for example, a staff member emergency).

To Add Staff Contact to Staff Record

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Contacts* tab.
- Press **Add**. The **Staff Contacts** form is displayed.
- Enter contact information.
- Save and close record.

About Staff History Records

Add historical information about the staff member like immunizations, physicals, rank changes, and the issuance of generic equipment. You can automatically prompt to add staff history records via the Administrative Options form Staff section.

See 'To Specify Staff Administrative Options' on page 51 for more information.

To Add Staff History Records

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Additional Records* tab.
- Press **Other History**. If no history details have been entered, the **History Detail** form is displayed. If history details have been added, a list is displayed. Press **Add**.
- Enter *Date*, *Time*, and *Quantity*.
- Type or look up the staff member history code in the *Code* field.
- Enter any pertinent notes.
- Check *Require staff administrative rights to view* if the history record should only be viewed by users with administrative access.
- Press **Save** and close record.

About Staff Equipment Records

Add or view equipment associated with the staff member. When equipment records include the staff member's ID, the equipment is listed here.

To Add Staff Equipment to Staff Record

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Additional Records* tab.
- Press **Equipment**.
  - If inventory records have been entered with the staff member's *Staff ID*, these records are listed in the **Staff Member Equipment/Inventory** form:
    - Press **New** to add a new inventory record. Complete inventory record then save and close.

   - Press **Add Link** to associate existing inventory records with the staff member, select inventory records, then press **OK**.
   - Press **Delete** to remove the association between a staff member and inventory record, highlight the record.
 - If no inventory records have been entered for the staff member, a blank *Inventory* form is displayed.
   - Complete inventory record.
   - Save and close **Inventory** form.
- Press **Close**.

About Staff Availability Records

Availability records are used in participation reports to indicate the percentage of calls or training a specific number responds to, and the percentage of calls or training records a member responds to based on the member's availability status.

For a given date/time/station/unit/staff member, FIREHOUSE Software scans all availability records where the event date falls within the range of dates on the availability record. It then compares the day of the week of the event with the day of week check boxes for that availability record. If the availability type is *Unavailable* and the day of week checked for the day of the event is NOT checked, it assumes the member is available, otherwise it returns unavailable. It works just the opposite for *Available*. All of this is added to the time range. Note that the time range entered on an availability record applies to EACH day in the range.

When there are overlapping availability records, the records are sorted first by *From Date*, then by *To Date*. The last availability record determines availability status, unless one of the records has priority (if availability records overlap, give this record priority is enabled).

Overlapping Availability Record Example

The dates:	**From Date**	**To Date**	**Times**	**Availability**
	03/01/2006	12/01/2006	8-5	Available
	06/01/2006	06/08/2006	8-5	Unavailable
	06/01/2006	06/03/2006	8-5	Available
Will be sorted as these dates:				
	03/01/2006	12/01/2006	8-5	Available
	06/01/2006	06/03/2006	8-5	Available
	06/01/2006	06/08/2006	8-5	Unavailable

The staff member is unavailable from June 1 to June 3 even though the last entered availability record indicates available (unless the "available" record is assigned priority) because of the greater *To Date* in the "unavailable" record.

You specify availability for a member by setting up availability codes in the *Staff Member Codes* lookup codes, then adding availability records for the member.

To Add Staff Availability

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or `Ctrl + O`), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Additional Records* tab.
- Press **Availability**.
  - If no availability records have been added for the staff member, the **Availability Detail** form is displayed.
  - If availability records are listed, press **Add**. The **Availability Detail** form is displayed.
- Type the *From Date*, *To Date* start and finish date the availability applies to.
- Type the *From Time* and *To Time* the availability applies to.
- Press the days of the week in the **On These Days** area the availability applies to.
- Enter a specific *Station*, *Shift*, *Unit* only if the availability applies to a particular station, shift, or unit (for example, indicate that staff member is available only for a particular station). Note that if the *Station/Shift/Unit* of the event OR the *Station/Shift/Unit* of the availability record are blank, that piece of criteria is ignored (i.e. assumes a match).
- Check *If availability records overlap, give this record priority* if you want this record to override other overlapping availability records.
- Press **New** to add additional records, or save and close record.

About Staff Administrative Information

Add and edit confidential administrative information about the member. This is a high security area with additional access control through individual user security.

To Add Staff Administrative Information

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or `Ctrl + O`), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Additional Records* tab.
- Press **Administrative**.

- Enter general administrative information in the *Basic* section.
- Press **Insurance** to add insurance details for the staff member. If insurance records have already been added, press **Add**.
  - Add available insurance information.
  - Press **New** to add additional insurance records. Save and close when finished, then press **Close**.
- Press **Pay Rates** to enter details about pay rates. If pay rate records have been added, press **Add**.
  - Add an actual pay rate by entering the effective date range, selecting *Actual Pay Rate* then entering a value in *Pay Rate*. You also select whether this rate is hourly or salary. Default pay is used when activities for the member are entered, and pay scale is not entered. For example, if a staff activity is entered with 3 hours in the *Hours Paid* field and no pay scale code is entered, the member will be paid for 3 hours at the default rate. If $10 is the default rate the member is paid $30.
  - Add an hourly cost/billing rate by entering the effective date range, selecting *Hourly Cost/Billing Rate* then entering a value in *Hourly Cost*.
  - Add a pay scale rate by entering the effective date range, selecting *Pay Scale Rate* then entering the *Pay Scale* code and the *Pay Scale Amount*.
  - Save and close when finished, then press **Close**.
- Press **Casualty Reports** to enter casualty reports for the staff member. The **Fire Service Casualty Report** form is displayed (also used for incident reports when there are fire service casualties). When accessed from the staff member record, the casualty report will not relate to any specific incident. Casualties can also be added from **Staff Activities** or **Training Class** records.
  - Save and close when finished, then press **Close**.
- Press **EMS Exposures** to display a list of EMS exposures for the staff member. EMS exposures are added from the **EMS Search/Rescue Report**, **Patient/Victim Information** form.
  - Highlight exposure then press **Open** to review.
  - Save and close when finished, then press **Close**.
- Click the *EMS* tab to complete emergency medical service related information about the staff member (required for some EMS code sets).
- Click the *Notes* tab and add staff administrative notes. When you are finished, press **F7** to spell check entered text.
- Save and close record when finished.

Associating Users With Login Records

When a staff member is associated with a specific login record, the audit information in FH that reports specific actions performed by specific login records can be related to a specific staff member. Typically staff is associated with a specific user login record when the login record is created, and you can review the login groups and add links to specific login records as needed.

For more information on adding login records, see "About Users", on page 67.

To Review/Add Staff Links to Login Records

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or `Ctrl + O`), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Additional Records* tab.
- Press **User Setup**.
- To add a new user login record, press **New**.
- To display the current linked login records, highlight the item then press **Open**.
- To add a new link, press **Add Link...**, select a login record to associate with the staff record, then press **OK**.
- To remove an existing link, highlight the item then press **Remove Link...**
- Press **Close**.

Hiding Staff Members

Staff records should not be deleted since this will invalidate all the activities, training, and other records the staff member participated in. As an alternative to deleting a staff record, you can mark the staff record as hidden. This will remove the staff from browse lists used to add staff to activities.

To Hide This Staff Member

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or `Ctrl + O`), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Other* tab.
- Check *Hide this Individual* if you want this member excluded from the list displayed when **Add Group** is pressed from the Staff Activity form (the member is still displayed in staff browse forms).
- Save and close record.

Assigning Staff Member Instructor Codes

Training class records include *Staff Member Instructor* codes to make it possible to track different instructors. You can directly link *Staff Member Instructor* codes with a specific staff records.

To Assign Staff Member Instructor's Code

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or `Ctrl + O`), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Other* tab.
- Type a *Staff Member's Instructor Code* value to assign. When you save the staff record, the code and staff member's name will automatically be added to the instructor codes.
- Save and close record.

Completing User Fields and Attaching Files

You can complete user fields if they have been defined for staff records, and attach files.

To Complete Staff User Fields

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or `Ctrl + O`), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Other* tab.
- Press **User Fields**.
- Complete fields, then save and close.

To Attach File to Staff Record

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or `Ctrl + O`), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Other* tab.
- Press **Attachments**.
- Press `F1` for details on using this form.
- Save and close attachment.
- Save and close staff record when finished.

About Staff Locking and Modification History

Staff records can be locked from modification by non-administrative users. A complete history of modifications can be viewed for the record.

To Change Record Lock Status

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Other* tab.
- Press **Record Lock Status**. The **Record Lock Status** form is displayed.
- Check *Lock Record* to manually lock records. Only users with administrative access can modify locked records.
- Press **OK** to save.
- Save and close staff record when finished.

To Review Record Modification History

- From the **File** menu, select the **Staff Members** option.
  - If the **Staff** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight a record, then press **OK**.
  - If the **Query** form is displayed, highlight a record, then press **OK**.
- Click the *Other* tab.
- Press **Record Modification History**. The **Record Modification History** form is displayed. The amount of information displayed depends on the level of tracking selected from the **Administrative Options** form *Database* section.
- Press **CLOSE**.
- Save and close staff record when finished.

Understanding Staff Activity Records

Staff activities are events, incident and non-incident related, that staff members participate in. Staff activities revolve around the user-defined staff activity codes set up in the general system codes. A single staff activity record can have multiple staff member participants.

A single participant can be added to a staff activity more than one time as long as a different *Staff Activity Types* code is used. This allows you to track different types of activities for a single activity.

About Staff Activities

The default staff activity information is defined in the main **Staff Activity** form. Participants are then added and default from the main activity is applied to individual staff member's activity records. You can modify activity default information after participants are added but changes to the main activity are not applied to existing participant records. Staff members added after main activity default information is changed has the new information applied. Individual staff member activity records can be modified one at a time, or changes can be applied to all activity participants in one step.

To Add a New Staff Activity Record

- From the **File** menu, select the **Staff Activities** option.
  - If the **Staff Activity** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
  - If a blank **Staff Activity** form is opened, you are ready to enter a new staff member.
  - If the default query for selecting staff records is displayed, press **Cancel** to add a new record.
- Modify today's *Start Date*, if necessary.
- Type or look up the *Default Activity Code* for the activity. The values you select will be added to each participant's activity record. You can modify individual participant detail records, or change this value after adding participants.
- Change *End Date* if different than *Start Date*.
- *Activity Description* defaults to the description associated with the *Activity Code*. You can modify *Activity Description* if necessary.

- Lookup **Incident-Related Activity** (*FDID*, *Alarm Date*, *Incident Number*) to associate this activity with an incident. Generally, incident related activities are added from the NFIRS incident or EMS incident report.
- Press either **NFIRS Incident Reports**, **EMS/Search & Rescue Incident Reports**, or **Dispatch/Remote Station Incident Reports**, highlight a record, then press **OK**.
- Check *Count this activity as part of incident response* to include staff added to this activity in incident counts.
- The values added to the **Default Values** area fields are added to each staff member record added for the activity. If necessary, you can edit the values for specific participant detail records.
    - Type or look up the *Station*, *Shift*, *Unit* of staff members added to the activity. If most staff share a particular station, shift, or unit, add values to these fields. These fields can be left empty.
    - Type the number of *Hours Worked* for staff members added to the activity (can be different than hours paid). Note that depending on the activity, the *Hours Worked* value may be greater than zero even if the participant did not actually work, such as the instance of an activity for sick leave.
- Select at least one **Activity Type**:
    - Select any combination of *Fire*, *Rescue*, *Medical*, *Other* depending on the type(s) that best describe the activity. Note that the selection will be used in reports to determine incident type counts.
    - Check *Attendance Required* if appropriate.
- Enter default participant payroll values in the **Payroll Calculation** area.

See the FH Help File 'Pay' topic for additional information on payroll calculations.

- To add one staff member, press **Add**. The **Attendee Detail** form is displayed.
    - Type or look up the staff member to add to the staff activity in *Staff ID*. Other values in this form are brought in from the **Staff Activity** form when available. Fields can be modified as necessary.
    - Press **New** to add an additional participant detail, or save and close detail record.
- To add multiple staff to an activity at a time, press **Add Group**. Staff members available to add to the staff activity are displayed in the left. Listed staff member records are not modified in any way from the **Staff Group Select** form.

NOTICE
Specify Group Select Method

Specify which section to display in the **Administrative Options** form *Staff* section. The *Staff Master* section is the default section.

    - If the **Staff Group Select** form *Staff Master* section is displayed:

- Add specific *Status*, *FDID*, *Station*, *Shift*, *Unit* values. When the value is included in the staff member record, the staff member is listed (unless the staff member record is designated as hidden). By default, the staff member is included in the list if the corresponding field in the staff member's record is blank.
- If you have a saved set of criteria, select the set from the *Restore from Saved Criteria* drop down field and the values for each field saved with the set are applied. Save *Status*, *FDID*, *Station*, *Shift* and *Unit* field values as a set by pressing **Save Criteria As**. When you wish to modify the set, change the values in the appropriate fields and press **Update Criteria** to modify the saved criteria.
- Check *Match Criteria Exactly* to include staff in the list only if the values you specify exactly match the corresponding fields in the staff member record. If a criteria field has a value and the corresponding field in the staff member's record is blank, the staff member is not listed.
- Check *View Hidden Staff Members* to display staff members that are designated as hidden.

A staff member record is designated as hidden from the **Staff Member** form, *Other* section.

- Check *Limit the list of staff members available on* and specify a date and/or time to use as criteria for listing staff. If a staff member has a specific availability record indicating that the staff member is NOT available at the entered date and/or time, they will be excluded. Staff members without availability records are listed when they meet other criteria regardless of the date and/or time unless *Match Criteria Exactly* is checked.

NOTICE
Save Criteria

Before selecting displayed list of staff to activity, be sure to press **Update Criteria** if you want changed criteria to be available when the criteria is next used. If you want the specific list displayed to be available as a group, press *Save Group As* and specify a group name that will be available from the **Staff Groups Select** form *Saved Groups* section. Saved groups are listed in the *Saved Groups* section.

- Select staff to add to activity. Select multiple staff by pressing `Ctrl` while selecting. A staff member is selected when the name is highlighted. Press **OK** to add selected staff to the activity.

- If the **Staff Group Select** form *Station Roster* section is displayed:
  - Select the *Station*/*Shift*/*Unit* and corresponding staff are listed.

    - Select staff to add to activity. Select multiple staff by pressing **`Ctrl`** while selecting. A staff member is selected when the name is highlighted. Press **OK** to add selected staff to the activity.
  - If the **Staff Group Select** form *Saved Group* section is displayed:
    - Select group and corresponding staff are listed.
    - Select staff to add to activity. Select multiple staff by pressing **`Ctrl`** while selecting. A staff member is selected when the name is highlighted. Press **OK** to add selected staff to the activity.
- Change activity details on the **Staff Activity - Group Add** form as necessary.
- Press **OK** to add participant details for selected staff members with the values you specify.
- Complete remaining fields as necessary.
  - Public education and public service information can be added to the *Public Education/Service* tab.
  - Notes about the staff activity can be added to the *Notes* section.
  - Add user fields, attach files, complete casualty reports and add equipment used as needed to the *Other* tab.
  - A summary of attending staff is listed in the *Staff Summary* tab.
- Save and close staff record when finished.

Understanding Training Classes

A training class is given to develop staff members skills. Training classes are divided into categories, which are set up in the training category codes in personnel and training codes. When you set up the code, you can add a default objective of the course. When a training class is used with the code, the objective is added to the training class. Training classes can only use one category, but one category can be used in multiple classes. You can report on staff members training in specific categories and training classes can be credited toward any training programs (also referred to as certifications) the staff member is enrolled in. Training programs can require a certain number of hours in a specific training category.

Training programs are detailed on page 94.

Guidelines for Adding Training Classes

We recommend documenting what was done in a training exercise, not simply entering a brief description and time spent. Non-training activities like business meetings should be tracked via **Staff Activity** records. All staff member training should be entered in FH, whether the training is in house or at some other organization like the National Fire Academy. Below are guidelines for entering useful training records.

- Add *Training Categories* lookup codes for specific types of training classes. We recommend avoiding codes like ‘Monthly Drill’, or other generic codes that do not describe the training subject. Descriptive *Training Categories* codes make your life easier when it is time to search for specific training and/or try to gather statistics on all training given in a specific period.
- Associate a *Default Objective* with each *Training Categories* code. Entering the training objectives, outline, or training scenario up front makes entering complete training records much easier. When you enter information in the *Default Objective* for a *Training Categories* code, the *Default Objective* is automatically inserted into the *Notes* section of the training record. You can edit the *Notes* section or add additional comments to further clarify the training session if necessary.
- Complete optional fields. There are only a few required training class fields, but some of the optional fields are important. Enter *Start Date*, *Start Time*, *End Date*, *End Time*, *Class Description* (if different than that of the *Training Categories* code description), **Training Type** (*Fire*, *Medical*, *Rescue*, *Other*), and *Hours Worked*,

Location, *Agency*, *Method of Instruction* (for example, “Lecture”, “Hands-on”, “Video”, etc.), *Hours Paid*, *Credit Points*, *Pay Scale*, *CEU* (number of Continuing Education Units, if appropriate), *Dept Course Number*, and a few other fields are all optional. Use them if appropriate.

- Add all staff members who should have been present if *Training Required* is checked and indicate in the **Training Detail** records who actually attended. If *Training Required* is not checked, only enter the staff members that attended the training.
- Add a training record for each topic covered in a training session. Use **Memorize Templates** to copy the training record including staff members attending and **Recall Templates** to create a new training record with the memorized staff members to simplify the process of entering multiple training records for a training session.

To Add Training Class

- From the **File** menu, select the **Training Classes** option.
  - If the **Training Class** form with the last modified record is opened, press **New** (or `Ctrl + N`) to add a new record.
  - If a blank **Training Class** form is opened, you are ready to enter a new record.
  - If the **Query** form is displayed, press **Cancel** to add a new record.
- Current system date is included in *Start Date*. Enter the date the class will be conducted. You can enter a historic date, a future date, or keep today's date (automatically inserted).
- Type or look up a *Category*. The description associated with the selected training category is inserted into *Class Description*.
- Change the *Class Description* if necessary.
- Type or look up the *Agency* providing the training.
- Type a *Dept Course Number* (for example, catalog numbers or other IDs assigned to the particular training class).
- Press **Instructors** to add all instructors teaching the class.
- The values you add to the **Default Values** area fields are added to each staff member record added for the activity. If necessary, you can edit the values for specific participant detail records.
  - Type or look up the *Station*, *Shift*, *Unit* of staff members added to the activity. If most staff share a particular station, shift, or unit, use these fields. These fields can be left empty.
  - Type the *Hours Worked* for staff members added to the activity (can be different than hours paid).
  - Type the *Credit Points* to add to each staff member record added for the activity. If necessary, you can edit the values for specific participant detail records.
- Type the *CEU* (continuing education units) assigned for attending the training class.

- Check *Attendance Required* if attendees are required to attend the training class.
- Select any combination of *Fire*, *Rescue*, *Medical*, *Other* depending on the type(s) that best describe the activity.
- Add **Payroll Calculation** area information.

See the FH Help File 'Pay' topic for additional information on payroll calculations.

- Add at least one participant to the training class:
  - To add one staff member:
    - Press **Add**. The **Attendee Detail** form is displayed.
    - Type or look up the staff member to add to the staff activity in *Staff ID*. Other values in this form are brought in from the **Training Class** form when available. Fields can be modified as necessary.
    - Press **New** to add an additional participant detail, or save and close detail record.
  - To add multiple staff to a training class at a time:
    - Press **Add Group**. The **Staff Group Select** form is displayed.

The process for adding groups is the same as adding groups to staff activities. See page 88 for details.

    - Once selected staff are added, the **Training Class - Group Add** form is displayed. Values are brought in from the **Training Class** form when available. Fields can be modified as necessary.
    - Press **OK** to add participant details for selected staff members.
- Complete remaining fields as necessary.
  - Rating bureau criteria can be added to the *Rating Bureau* section.
  - Notes about the training class can be added to the *Notes* section. The training class objective is typically entered into the notes field.

NOTICE Default Objective	A default objective can be added to the *Training Categories* code, and when the code is added to a new training class, the default objective is inserted into the training class notes.

  - Add user fields, attach files, complete casualty reports and add equipment used as needed to the *Other* section.
- Save and close training class.

Understanding Training Program Records

Training programs are certification programs for staff members. Training programs are a set of requirements that, when met, certify staff members in the given training program. Requirements can be training classes, required activities, or electives.

Setting Up Training Programs

Training programs are set up as follows:

- Set up *Training Category* codes and *Staff Activity* codes for certification requirements.
- Add a training program, including:
  - training, activity, and elective requirements.
  - number of hours required for each training, activity, or elective (or check *Skills Based* to accept when objective is met regardless of hours).
  - staff members enrolled in the training program.

FH automatically tracks staff member training and staff activities. When a training activity record with the required training category code and the staff member is added to FH, the number of hours credited for the class is automatically subtracted from the corresponding required time in the training program. When the staff member has taken the number of hours (or more) in the training category required in the training program, they are recorded as having satisfied this particular requirement. The same is true when a staff activity record for a staff member enrolled in a training program is added using the staff activity code set up as a training program requirement. When a training activity record with a training category code within a training category code group added as an elective and the staff member is added to FH, the number of hours credited for the class is automatically subtracted from the corresponding required time in the training program. Note that if a specific training category is required for a training program AND the training category is in a training category group added as an elective, hours will be credited for the specific training requirement and the elective requirement.

To Add New Training Program

- From the **File** menu, select **Training Programs and Certifications** option **Training Programs** option.
  - If the **Training Program** form with the last modified record is opened, press **New** (or `Ctrl + N`).

- If a blank **Training Program** form is opened, you are ready to add a new record.
- If the **Query** form is displayed, press **Cancel**.

- Type a training program *Description*.
- Type or look up the *Certification/Program Code*. Press Enter or Tab on the keyboard.
- Enter the *Duration in Months* for the period of time the certification is valid for, if applicable.
- Press **Add**. The **Training Program Requirement Detail** form is displayed.
- Select **Requirement Type**:
  - Select *Training* and Type or look up the training category code.
  - Select *Activity* and Type or look up the activity code.
  - Select *Elective* and Type or look up the training category code group.
- Type the *Hours Required*, or if the training/activity/elective is not added unless a specific skill is assumed for the attendee and is not based on hour, check *Skill Based*.
- Press **New** to add additional training or activity requirements, or press **Save** then **Close**.
- Click the *Staff Members* tab.
- To add a staff one at a time, press **Add**. The **Staff Member Training Program Detail** form is displayed.
  - Type or look up the staff member's ID in *Staff No*.
  - Type or look up the *Original Cert Date* that the staff member was certified, if applicable.
  - Type or look up the *Current Certification Date* the current certification was given to the staff member, if applicable. If you change the date in this field, all activities/training classes attended in the period between the current and expiration date are displayed.
  - Type or look up the *Current Exam Score* the staff member was given towards receiving the current certification, if applicable.
  - Type or look up the *Expiration Date* the certification lapses (becomes invalid). If a value is entered in the *Duration in Months* field of the **Training Program** form, this date is calculated for you.
  - Review requirements. The **Requirement Summary** area lists training or activity requirements the staff member must take to satisfy certification requirements.
  - *Type* lists the type of training, "T" for training, "A" for activity, and "E" for elective.
  - *Code* is the *Training Category*, *Activity Type*, or *Elective Category* code group.
  - *Req'd Hrs* is the number of hours required.
  - *Cur Hrs* is the number of hours currently met.

        - *Balance* is the required hours minus current hours for the staff member.
    - Review requirement details. When a specific requirement is highlighted in the **Requirement Summary** area, the training or activities the staff member has taken to fulfill the requirement in the time between the *Current Cert Date* and *Expiration Date* are listed in the **Details for** area.
- Press **New** to add an additional staff member to the training program, or save and close record.
- To add multiple staff at a time, press **Add Group**. The **Staff Group Select** form is displayed.

The process for adding groups is the same as adding groups to staff activities. See page 88 for details.

- Complete remaining fields and add related records as necessary. Notes are added from the *Notes* section. User-defined fields, attached files, and equipment usage records are added from the *Other* section.
- Save and close when finished.

Renewing Expired Certifications

Training programs are set up with an expiration date, and should be renewed periodically.

To Renew an Expired Certification

- From the **File** menu, select the **Training Programs and Certifications** option, **Update Expired Certifications** option.
- Select the training program and press **Update.**
- Update staff member training program detail, then save and close.
- Press **Close**.

To Renew Multiple Expired Certifications

- From the **File** menu, select the **Training Programs and Certifications** option, **Update Expired Certifications** option.
- Select the training programs and press **Update Group**. Select multiple items by pressing `Ctrl` while selecting. A training program is selected when the name is highlighted.
- Press **Update Group**.
- Complete values to add to renewed training programs.
- Press **OK**.
- Press **Close**.

Chapter 8

Apparatus, Equipment, and Inventory

Apparatus, Equipment, and Inventory records track equipment information, maintenance activities, and usage.

Understanding Inventory Records

Inventory records should be added for all apparatus, equipment, and inventory you want to track in FH.

Creating New Inventory Records

All apparatus, equipment, and inventory should be entered as individual records. If a piece of equipment is stored on apparatus and you need to track the testing or maintenance of the equipment, enter the equipment as an individual record then associate the equipment with the apparatus (which should be a separate record) by using the inventory ID of the apparatus in the *Link To Inventory ID* field.

To Add Master Inventory Record

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
  - If a blank **Inventory** form is opened, you are ready to enter a new record.
  - If the **Query** form is displayed, press **Cancel** to add a new record.
- Type a *Description*. Add enough information to this field so that you can determine a particular piece of equipment from a list based on the information entered in this field. For example, describe the item, followed by the item's dimensions. A hose description might look like this: Hose, 4″, 100′.
- Type an *Inventory ID*, or if autogenerate IDs is enabled in **Administrative Options**, press **`Tab`** to let the program assign an ID. *Inventory ID* is used throughout the system to identify specific piece of inventory.
- Optionally type or look up a *Linked to Inventory ID* to link one piece of equipment with another. For example, a portable pump that is always stored on a particular attack vehicle. The *Linked to Inventory ID* field of the portable pump record should contain the attack vehicle's *Inventory ID*. Right-click and select from a list of valid IDs, or type the equipment ID of the apparatus that this item is on.

- Optionally type or look up a *Unit* to ensure that equipment usage in incidents can be tracked for the inventory record. When a responding unit is added to an incident, the apparatus usage records of the apparatus associated with the unit is automatically updated.
- Optionally type or look up the *Staff ID* for the member responsible for this apparatus or equipment if necessary (for example, the staff member the item was issued to).

Open the FH Help File and search for 'Staff Equipment' for more information on adding and reviewing staff equipment.

- Optionally type or look up a *Location* code. *Location* can be generic or specific to a specific apparatus. The location code is also used in generic equipment records. When adding location codes specific to a piece of apparatus, make sure that the locations are displayed in the order of a walk around the apparatus, so when you print the **Apparatus Inventory Checklist** report for the equipment record, you can efficiently check the inventory items as you walk around the vehicle.
- Optionally type or look up the *Occupancy ID* to associate a specific occupancy record with the inventory record.
- Optionally type or look up a *Vendor* code to associate a specific vendor with the inventory record.

See page 215 for information on adding vendors.

- Type or lookup *Inventory Class* code that best describes the inventory record.
- Optionally specify purchasing/replacement information:
  - *Annual Repl Cost* is the annual amount set aside to replace apparatus/equipment.
  - *Date Received* is the date you took possession of the item.
  - *Hr/Unit Cost* is the amount to run equipment (or unit cost for inventory items).
  - *Placed in Service* is the date you put the item into service.
- Check appropriate **Miscellaneous** attributes:
  - Check *Generic Equipment* to identify the equipment record as generic. Since this is a master record, do not check *Generic Equipment*.

See 'To Add Generic Inventory Record' on page 100 for the steps.

  - Check *Out of Service* to identify the equipment as out of service.
  - Check *Hide Equipment in Lookups* to mark this equipment as hidden. Queries that display equipment records can be modified so they exclude equipment marked as hidden.
  - Specify the *Quantity Unit* indicating the unit of measure associated with the inventory (for example, 'Quarts'). This value is displayed after *Quantity* fields in usage detail records.
- *Last Meter Reading* fields and *Last Maintenance/Test* fields are displayed for reference purposes.
- Press **Save**, then close the inventory record.

About Generic Equipment

Generic equipment is a class or group of equipment that is usually not kept in the same location. Once you have added the generic equipment record (entered as a standard inventory record with *Generic Equipment* checked) you can add this generic equipment to the inventory record that the generic equipment is located on.

If you have set up *Equipment Location* lookup codes specifically for the primary apparatus, and run the **Apparatus Inventory Checklist** report, all generic equipment and equipment linked to the main apparatus will be listed by the equipment location. Note that for this to work properly, you should set up the equipment location codes so they are sorted as the locations would be situated during an inventory check (that is, walk from one location to the next).

To Add Generic Inventory Record

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
  - If a blank **Inventory** form is opened, you are ready to enter a new staff member.
  - If the default query for selecting staff records is displayed, press **Cancel** to add a new record.
- Type a *Description*. Add enough information to this field so that you can determine a particular piece of apparatus from a list based on the information entered in this field. For example, describe the item, followed by the item's dimensions. A hose description might look like this: Hose, 4″, 100′.
- Type an *Inventory ID*, or if autogenerate IDs is enabled in **Administrative Options**, press **`Tab`** to let the program assign an ID. *Inventory ID* is used throughout the system to identify specific piece of inventory.

See page 215 for information on adding vendors.

- Check *Generic Equipment*. Generic equipment is added to master inventory records from the *Linked Inventory* section.
- Press **Save**, then save and close inventory record.

To Link Generic Equipment to Inventory Record

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or **`Ctrl + O`**), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.

- Click the *Linked Inventory* tab.
- Press **Add**. The **Generic Equipment Detail** form is displayed.
- Type or lookup the equipment number for the generic equipment you wish to add to the current equipment record in *Generic Inventory ID*. When you perform a lookup a list of inventory records marked as "Generic Equipment" is displayed.
- Type or lookup the *Location Code*.
- Type the number of generic equipment items in *Quantity*.
- Type the value of the generic equipment in *Unit* value. The total value (*Quantity* times *Unit Value*) is displayed in *Total value*.
- Type notes on the generic equipment detail record.
- Save and close **Generic Equipment Detail** form.
- Save and close inventory record

About Inventory Specifications

You can add specification details for the inventory record. Available specification values vary depending on the inventory type. Once an inventory type is selected and specifications are added, you should not change the inventory type. Changing the type results in loss of data.

To Add Inventory Specifications

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or `Ctrl + O`), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click the *Specs* tab.
- Select the *Inventory Type* for the inventory record. Changing the type after maintenance records are added results in loss of data. Inventory types:
  - "Apparatus" type inventory adds apparatus specific fields in the *Specs* section.
  - "Pump" includes pump specific fields in the *Specs* section and **Maintenance/Test Detail** records include specialized pump testing information (NFPA 1911 based).
  - "Hose" includes hose specific fields in the *Specs* section and **Maintenance/Test Detail** records include the specialized hose testing information.
  - "SCBA" includes SCBA specific fields in the *Specs* section and **Maintenance/Test Detail** records include specialized SCBA testing information.

- "Consumable" includes quantity on hand information in the *Specs* section. Usage records can be added in other FH areas (including EMS Procedures/Medications, and Inventory Maintenance Testing) to adjust quantity available for this specific consumable inventory record.
- "Personal Protective Eqpt" includes basic description fields and, when selected, include additional specialized fields in maintenance/test detail records for tracking equipment issuance and condition.
- "Ladder" includes specific ladder specifications and, when selected, add specialized ladder testing fields to maintenance/test detail records.
- "Other", when selected, has no special fields and the *Specs* section has no additional fields available.

➊ Save and close inventory record.

Tracking Inventory Maintenance

Maintenance records can be added as they are scheduled, or after they have been performed. Scheduled maintenance adds a scheduled maintenance record to the **Maintenance** area of the *Maintenance/Test* section if you specify number of days for interval, and check *Auto-Create Future Maintenance Records for this Job*. Auto-Create is available any time a value is entered in the *Number of Days* field, but we recommend that you do not automatically schedule critical maintenance items using this feature. Instead, add critical maintenance records from the **Maintenance** area.

To Add Maintenance/Test Records

➊ From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.

- If the **Inventory** form is displayed press **Browse** (or **`Ctrl + O`**), select record, and press **OK**.
- If the **Query** form is displayed, select record and press **OK**.

➊ Click the *Maintenance/Test* tab.

➊ Press **Add**. The **Maintenance/Test Detail** form is displayed.

NOTICE
Batch Maintenance

If you are testing or maintaining multiple pieces of equipment at the same time, use “Batch Maintenance” from the **File** menu, select **Apparatus Equipment and Inventory**, then **Batch Maintenance/Test Entry**. You can add similar testing or maintenance records to all relevant apparatus records.

See the **FH Help File** “Batch Maintenance” topic for details.

➊ Type the *Work Order #* assigned for the maintenance/testing.

- Type or lookup the *Job* code used to categorize the maintenance or testing type.
- Select *Scheduled* and enter the *Start Date* if this maintenance/test detail has not been completed. Select *Completed* and enter the date the maintenance/detail record was completed in *Start Date*.
- Type the number of *Staff Hrs* spent for this maintenance/testing.
- Type the number of hours the equipment was unavailable due to the maintenance/testing in *Down hours*.
- Type the dollar amount spent for *Parts*.
- Type the dollar amount spent for *Labor*.
- Type or lookup the *Staff ID* for staff performing the test/maintenance.

NOTICE
Track Staff Hours

Add a staff activity record for the staff member from the *Other* section if you want to track staff hours performing maintenance/testing.

- To add additional related jobs, press + to add one or ++ to add multiple additional records.
- Available fields in the *Details* section vary depending on the inventory type. "Pump", "Hose", "SCBA", "Personal Protective Eqpt", and "Ladder" inventory types include specialized values in this section.

NOTICE
Personal Protective Equipment

The "PPE" type inventory record should be issued to a specific staff member by adding a maintenance/test detail for the record and indicating that it has been issued. The *Staff ID* for the "PPE" type inventory record is critical for tracking who has been issued the inventory record. You can specify that when the *Staff ID* value for the "PPE" type inventory record is modified, you are prompted to add a new "PPE" issued maintenance/test detail record via the **Administrative Options** form *Inventory* section.

- Track the use of consumables used for this maintenance/test in the *Usage* section.
- Type additional information about the maintenance/test in the *Notes* section.
- Add user fields, add attached files, access record modification history, and add staff activities for this maintenance/test in the *Other* section.
- Save and close maintenance/test detail record.
- Save and close inventory record.

To Add Scheduled Maintenance

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
    - If the **Inventory** form is displayed press **Browse** (or **`Ctrl + O`**), select record, and press **OK**.
    - If the **Query** form is displayed, select record and press **OK**.
- Click the *Maintenance/Test* tab.
- Press **Add** located below the **Scheduled Maintenance** area to schedule maintenance or testing. The **Scheduled Maintenance/Test Detail** form is displayed. Maintenance records added to the **Scheduled Maintenance** section do not create maintenance records in the **Maintenance** section. You must run a report to identify when a scheduled maintenance record is due.
- Type or lookup the *Job Code* for the maintenance or testing.
- Enter **Performance Interval** values:
    - If you enter a value in *Mileage Interval*, the maintenance/testing indicates that maintenance is due every time the number of miles specified elapses.
    - If you enter a value in *Hour Interval*, the maintenance/testing is scheduled every time the number of hours specified elapses.
    - If you enter a value in *Number of Days*, the maintenance/testing is scheduled every time the number of days specified elapses.
- Select *Auto-Create Future Maintenance* to schedule future records based on the usage. This option is only available if a value is entered in *Number of Days*.

NOTICE
Critical Maintenance

Do not rely on auto-scheduled maintenance/testing for critical items that must be tested at a precise interval if intervals other than days are used. If values other than days are used, maintenance may actually be due for maintenance before the date in the scheduled maintenance record, depending on usage.

- Press **Save**.
    - If *Auto-Create Future Maintenance* is checked, the **Define Auto-Maintenance Parameters** form is displayed. Add information about maintenance records then press **OK**.
- Press **Close**.
- Save and close inventory record.

To Run Maintenance Due Report

- Select the **Reports** menu **Apparatus, Equipment, & Inventory Reports**.
- Select the **Apparatus & Equipment Maintenance Reports** category *Equipment Due for Scheduled Maintenance* report.

- Press **Run**.
- Select output, then press **OK**.
- Complete query parameter values to limit included records, or leave as is and press **Run Query** to list all records.

Tracking Inventory

You can track inventory usage. There are two steps, add inventory items then track item usage. Availability can be tracked from the **Inventory** form *Usage/Purchasing* section.

Usage records are added from equipment usage records that can be added from NFIRS and EMS incidents, staff activities, training classes and programs, and inventory records. You can add non-incident usage information like training usages, parades, and other miscellaneous usage items. Equipment usage can be added directly from the Other section of the fire or medical incident report, or, for non-incident usage, from the **Inventory** form, *Usage* section. The steps below assume that you are in the **Inventory** form, **Usage** section of the apparatus/equipment you want to add a usage record for.

To Add Inventory Item

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or `Ctrl + O`), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click *Usage/Purchasing* tab.
- Press **Add**.
- Type or lookup *Date* the item was added.
- Select a **Usage Type**.
- Type or lookup *Usage Code*.
- Check *Auto-Calculate Cost* to calculate the quantity entered in the *Quantity* field times the *Hr/Unit Cost* value entered for the item on the **Inventory** form **Basic** section.
- Select *Add*.
- Specify *Quantity*.
- If *Auto-Calculate Cost* is not checked, enter the *Total Cost*.
- Add remaining information as necessary, then save and close the form.
- Save and close inventory record.

To Add Inventory Item Usage from Inventory Form

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or `Ctrl + O`), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click *Usage/Purchasing* tab.
- Press **Add**.
- Type or lookup *Date* the item was added.
- Select a **Usage Type**.
- Type or lookup *Usage Code*.
- Check *Auto-Calculate Cost* to calculate the quantity entered in the *Quantity* field times the *Hr/Unit Cost* value entered for the item on the **Inventory** form **Basic** section.
- Select *Use*.
- Specify *Quantity*.
- If *Auto-Calculate Cost* is not checked, enter the *Total Cost*.
- Add remaining information as necessary, then save and close the form.
- Save and close inventory record.

To Review Inventory

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or `Ctrl + O`), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click *Usage/Purchasing* tab. The *Total Quantity* in the **Summary** area lists the total number of items added minus the total number of items used in usage/purchasing detail records.
- Save and close inventory record.

About Linked Inventory

Linked inventory is generic equipment that is physically located in an inventory record.

To Add Linked Inventory

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.

- If the **Inventory** form is displayed press **Browse** (or `Ctrl + O`), select record, and press **OK**.
- If the **Query** form is displayed, select record and press **OK**.

- Click *Linked Inventory* tab.
- Press **Add**.
- Type or lookup *Generic Inventory ID*. Only inventory records marked as 'Generic Equipment' (indicated on the **Inventory** form *Basic* section in the **Miscellaneous** area) can be added.
- Save when finished.
- Save and close inventory record.

To Review Equipment Hierarchy

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or `Ctrl + O`), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click *Linked Inventory* tab.
- Press **Equipment Hierarchy**.

  A tree-view of linked equipment is displayed with the *Linked to Inventory ID* equipment listed at the top (if any) and generic equipment added via the *Linked Inventory* section (if any) listed at the bottom.
- Press **OK** when finished.

About Inventory Form Other Section Options

You can add additional records and track record information from the **Inventory** form *Other* section.

To Add Inventory User Fields

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or `Ctrl + O`), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click the *Other* tab.
- Press *User Fields*.
- Complete user-defined fields, then save and close.
- Save and close inventory record.

To Attach Files to Inventory

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or **`Ctrl + O`**), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click the *Other* tab.
- Press **Attachments**. The **Attachment** form is displayed.

Press **F1** for information on using this form.

- Save and close inventory record.

To Lock Record

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or **`Ctrl + O`**), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click the *Other* tab.
- Press **Record Lock Status**. The **Record Lock Status** form is displayed.
- Check *Lock Record* to manually lock record. Non-administrative users will not be able to modify the record.
- Press **OK** to save.
- Save and close inventory record.

To Review Record Modification History

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or **`Ctrl + O`**), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click the *Other* tab.
- Press **Record Modification History**. The **Record Modification** form listing modification history is displayed. The amount of information displayed depends on the level of tracking selected from the **Administrative Options** form *Database* section.
- Press **CLOSE**.

Chapter 9

Occupancy Management

Occupancy records are not required to be entered before incidents can be entered. Occupancy information can be used in incident reports if the information is included in the occupant record. For example, address information is automatically filled in to the incident report, structure information from the occupancy record is added to the incident report for certain types of incidents, and occupancy contact information can be used to complete incident involvement records.

Adding Occupancy Records

Occupancy records include basic occupancy information, including address, building information, and contacts, inspections and activities, and additional information including related records, notes, and attached files.

Creating Occupancy Records

You should add occupancy records for every property that your department inspects or builds preplans for.

To Add New Occupancy Record

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
  - If a blank **Occupancy** form is opened, you are ready to enter a new occupancy.
  - If the **Query** form is displayed, press **Cancel** to add a new record.
- Type a description of the occupancy in *Occupancy Name*.
- Type an *Occupancy ID*, or if autogenerate IDs is enabled in **Administration Options**, press **`Tab`** to let the program assign an ID. *Occupancy ID* is used throughout the system to identify specific occupancies.
- Type or look up a valid station code for the *Station* that would respond to an incident at this occupancy.

NOTICE
Lookup Codes

These fields can be helpful in generating specific reports. For example, if you add station information to each occupancy, you can run the **Occupancy List by Station** report.

- Enter or lookup a *Property ID*. This field allows multiple occupancies to be associated with a single property.

NOTICE
Multi-Occupancy Records

Use *Property ID* to associate occupancies together when they are on the same property or under the same roof. Examples include separate apartment buildings in a complex, strip malls, schools, and manufacturing facilities. See 'To Add Multi-Occupancy Property Records' for the steps to add these.

- Enter the occupancy address information into the address fields.
- Type the *Parcel ID* assigned for the occupancy.

NOTICE
Parcel IDs

If your area does not use parcel IDs, you can use this field to track other numbers assigned to specific occupancies (for example, box numbers). You can enter a maximum of 25 characters in this field.

- Press **Supplemental Address** to add additional location information like latitude and longitude, zone, county, and township. Press **OK** when finished.
- Check *Self-Inspected Occupancy* to mark this occupancy as self-inspected. This attribute can be used to limit lists of occupancies to be inspected.
- Check *Primary Occupancy* to mark the occupancy as the primary occupancy record of occupancies using a common *Property ID*.
- Check *Hide Occupancy in Lookups* to remove the occupancy from lookups. This should not be checked if you will use the *Occupancy ID* in incident reports.
- Type or look up the *Construction Completed* date.

NOTICE
Districts

Response District and *Inspection District* both use the *District* lookup code. This allows for two separate values since they may be different.

- Save and close occupancy record.

Merging Occupancy Records

You can merge occupancy records. This feature may be used to combine two separate occupancy records that become one (for example, 2 stores at a strip mall entered as separate occupancies become a single store).

NOTICE
Merge Occupancies

The merge occupancy feature should not be used to merge two 'duplicate' records that were accidentally entered two times. After records are merged, the merged ‘from’ occupancy is still available in FH as a hidden occupancy record. The *Occupancy ID* value for the merged ‘from’ occupancy is not changed, so related records like incident response records still refer to the original occupancy for historical record-keeping purposes.

The following information is merged:

- Chemical Inventory
- On-Site materials

- Hydrant locations
- Storage tanks
- Preplan codes
- Attachments and Signatures

Hydrant and storage tank records are not duplicated if they already have been added for the occupancy.

A notes and briefs detail record detailing the merge is created on both the merged to occupancy and merged from occupancy and the merged 'from' occupancy is marked as hidden.

To Merge Occupancy Records

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record to merge to, then press **OK**.
  - If the **Query** form is displayed, select the record to merge to, then press **OK**.
- From the **Form** menu, select **Merge Occupancy Master Records**. The **Query** form is displayed.
- Select the record containing information to merge, then press **OK**. The **Merge Occupancy** form is displayed.
  - *Occupancy 1* is the original occupancy opened, and *Occupancy 2* is the occupancy selected from the **Form** menu **Merge Occupancy Master Records** option.
  - By default, all information from *Occupancy 2* is added to *Occupancy 1* unless you select *Merge to this occupancy* in the **Occupancy 2** area.
  - Select the child records to merge.
  - Press **OK**.
  - Carefully review the information in the prompt, then press **Yes** to merge.
- Press **Close** when finished.

To Review Merge Activity

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.

NOTICE
Merged Records

Occupancy records that are merged to another occupancy record are marked as ‘Hidden’, so the Query form *Show Hidden* checkbox needs to be checked to include these records.

  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record to review merge activity for then press **OK**.

    - If the **Query** form is displayed, select the record to review merge activity for then press **OK**.
- Click the *Additional Records* section tab, then press **Supplemental History**. The **Supplemental History** form lists occupancy notes and briefs details.
    - When records have been merged from an occupancy to the current occupancy, a 'MERGEFROM' *Code* record is listed. A summary of the information added by the merge is included in the notes and briefs detail *Notes*.
    - When records have been merged to another occupancy from the current occupancy, a 'MERGETO' *Code* record is listed.
- Highlight notes and briefs detail record.
    - Optionally press *Referenced Occupancy* to display the occupancy that was merged to or merged from, then press **Close**.
    - Press **Open**.
- Press **Close** when finished.

About Building Information

Occupancy building information includes vital specifications about the building like property use, detector information and automatic extinguishers, and information used to calculate needed fire flow.

To Add Building Information

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
    - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
    - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Building* tab.
- *Specific Property Use* is the only required field, but other fields in this section are used in incident reports when there are certain types of fire at the occupancy.

  NFIRS incident reports can include building information for certain incident types. When you complete a NFIRS incident report and use an *Occupancy ID*, building information associated with the occupancy is automatically inserted.
- Complete remaining fields as needed.
- Press **Save**.

About Owners and Contacts

You should add occupancy contacts if possible. Occupancy contacts can be owners, occupants, or keyholders.

To Add Owners & Contacts

NOTICE
Add Occupants

If you want to list occupants for the occupancy record, add occupants to the *Owners & Contacts* section.

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Owners & Contacts* tab.
- Press **Add**. The **Contact Detail** form is displayed.

  At a minimum, complete either *Last Name* or *Business name*.
- Complete remaining fields and sections as needed, then save and close form.

See the **FH Help File** “Occupant/Contact Detail” form topic.

About Occupancy Inspections

Occupancy inspections can be added from an Occupancy record or from the **File** menu, select the **Inspections** option **Inspection Records** option.

To Add Inspections & Activities

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Inspections & Activities* tab. Existing inspections and non-incident occupancy activities like plan reviews, public education, etc., performed at the occupancy are listed.
- Press **Add**.

- If there are outstanding violations for this occupancy (that is, there are violations that have empty violation repair dates and no variance issued), you are prompted to select the violation. Select violations and press **OK** to add the violation details automatically to the inspection detail record, or press **Cancel** to open the **Inspection** form without adding outstanding violations.
- If there are no outstanding violations, the **Inspection** form is displayed.

- Type or look up a valid inspection *Type* code for the inspection.
- Enter relevant information about the inspection, including the date the complaint was called in (*Received*), the scheduled date the inspection will be performed (*Scheduled*), and the date the inspection/activity is actually performed (*Completed*).

  If *Completed* is empty, any **Violation Notice** form printed for the inspection/activity detail will have no date listed for the inspection date. Use the last completed inspection/activity detail record for printing violations for the occupancy.

- Complete remaining inspection fields as needed. If you use the optional Accounts Receivable module and an invoice has been created for this inspection, the *Inspection Fee* is calculated for you, but note that any additional fees associated with violations (if any) are not included in the *Inspection Fee*.
- Save and close inspection.

To Batch Schedule Inspections Using Filter Parameters

- From the **File** menu, select the **Inspections** option **Batch Schedule Inspections** option. The **Batch Schedule Inspections** form is displayed.
- Change Select the method to "Select Using Filter Parameters".
- Select "Completed Inspection" or "Scheduled Inspection" then specify the date range for when the last inspection was performed at the occupancies that you will be creating inspections for.
- Type or look up *Inspection Type* codes to create new inspections for.
- Check *Exclude Reinspections* if you do not want to create any inspections based on inspections marked as 'Reinspections'.
- If necessary, specify *Occupancy Inspection District* and *Station* to limit created inspections to the specified district and/or station.
- Check *Include occupancies with any of the following specific property uses* and specify occupancy property use codes to create inspections for occupancies with the specified property use codes even when there are no matching inspections added previously.
- Check *Exclude any occupancies that already have a future scheduled inspection of the specified type* if you do not want to create an inspection for the occupancy if an inspection of the specified type already exists.

- Check *Exclude occupancies that are marked as hidden* if you do not want to create an inspection for occupancies marked as hidden even when the above criteria for creating an inspection are met.
- Press **Next>>**.
- Specify default values for the inspections that are created.
- To change values for specific fields included in a selected inspection, highlight inspection(s) and press **Update Field...**, select the element to change, type or lookup the value, then press **OK**.
- Press **Next>>**.
- Select remaining options:
  - Check *Automatically transfer any outstanding violations* to include outstanding violations in the inspections created.
  - Check *Transfer default occupancy contact as inspection responsibility party* to use the primary occupancy contact as the inspection responsible party value.
  - Check *Remove existing future scheduled inspections of the selected type for each occupancy* to remove other inspections of the same type. Use this feature to 'keep' inspections accurate when the inspection schedule changes.
- Press **Finish**. Inspections are created as defined.
- Answer **Yes** to prompt if you are creating additional inspections, or **No** to finish.

To Batch Schedule Inspections Using Occupancy Query

- From the **File** menu, select the **Inspections** option **Batch Schedule Inspections** option. The **Batch Schedule Inspections** form is displayed.
- Change the *Select the method* to "Select Using Occupancy Query...".
- Select an occupancy (or occupancies) then press **OK**.
- Press **Next>>**.
- Specify the start date for when the last inspection was performed at the occupancies that you will be creating inspections for.
- Specify default values for the inspections that are created.
- Press **Next>>**.
- To change values for specific fields included in a selected inspection, highlight inspection(s) and press **Update Field...**, select the element to change, type or lookup the value, then press **OK**.
- Press **Next>>**.
- Select remaining options:
  - Check *Automatically transfer any outstanding violations* to include outstanding violations in the inspections created.
  - Check *Transfer default occupancy contact as inspection responsibility party* to use the primary occupancy contact as the inspection responsible party value.

- Check *Remove existing future scheduled inspections of the selected type for each occupancy* to remove other inspections of the same type. Use this feature to 'keep' inspections accurate when the inspection schedule changes.

- Press **Finish**. Inspections are created as defined.
- Answer **Yes** to prompt if you are creating additional inspections, or **No** to finish.

To Add/Edit Violations

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or `Ctrl + O`), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Inspections & Activities* tab. Existing inspections and non-incident occupancy activities like plan reviews, public education, etc., performed at the occupancy are listed.
- Highlight inspection and press **OK**.
- Click the *Violations* tab to display the **Inspection** form *Violations* section.
- Press **Add** to add a new violation or highlight an existing violation and press **Edit** to modify an existing violation. The **Violation Detail** form is displayed.
- Enter the violation details, including the following dates:

	Reported	*Scheduled*	*Next Recheck*	*Actual Recheck*	*Repaired*
1st Inspection	Required. If no recheck is scheduled, check *Violation Noted - Do Not Schedule Recheck*. Enter the date the violation was discovered.	Disabled	If violation not fixed or no variance is issued, check *Violation Noted - Schedule Recheck* and enter date for next inspection	Leave Empty	Repair date, if applicable.
	If *Violation Noted - Schedule Recheck* is checked, the violation remains outstanding until an additional inspection is conducted. Below are the values displayed for the violation in the **Violation Detail** form.				
2nd Inspection	Reported date from previous inspection	*Next Recheck* date from previous inspection.	Same as above	Date inspection actually occurred	Repair date, if applicable.
And so forth…	Same information as 2nd inspection until the violation is repaired, or a variance is issued.				

- Press **Save**. If there are outstanding violations, and the date entered in the *Next Recheck* date field is greater than the system date, you are prompted to create a scheduled inspection (or inspections) for the date entered in *Next Recheck*.
- Press **Yes** to create a scheduled inspection. The **Create Scheduled Inspection** form is displayed. Press **OK**.

- Save and close inspection record.

To Add Violation Using the Inspection Checklist

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Inspections & Activities* tab. Existing inspections and non-incident occupancy activities like plan reviews, public education, etc., performed at the occupancy are listed.
- Highlight inspection and press **OK**.
- Click the *Violations* tab to display the **Inspection** form *Violations* section.
- Press **Use Checklist**.
- Complete the inspection checklist. For each item:
  - Select "Pass" if there was not a violation.
  - Select "Fail" if there was a violation, complete the violation details, then press **OK**. Failed items are added to the violations list.
  - Select "N/A" if the inspection did not review the item.
- Press **Save**.
- Save and close inspection record.

To Repair Multiple Violations

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Inspections & Activities* tab. Existing inspections and non-incident occupancy activities like plan reviews, public education, etc., performed at the occupancy are listed.
- Highlight inspection and press **OPEN**.
- Click the *Violations* tab.
- Press **Repair Multiple**. The **Repair Multiple** button is in select mode.
- Press and hold the **`Ctrl`** keyboard key, then select each violation to mark as repaired.
- Press **Repair Multiple**.
- Select whether to update the recheck date or the repaired date for the selected inspections.

- Type the date.
- Press **OK**.
- Save and close inspection record.

To Add Inspection Responsible Party

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Inspections & Activities* tab. Existing inspections and non-incident occupancy activities like plan reviews, public education, etc., performed at the occupancy are listed.
- Highlight inspection and press **OK**.
- Click the *Responsible Party* tab.
- Add information about the person (usually the occupancy owner) responsible for the inspection:
  - To use information from an occupancy contact record, press **Occupancy Contacts**, add parameter values, then press **Run Query**.
  - Highlight record, then press **OK**.
- Complete remaining responsible party information as needed.
- Save and close inspection record.

To Add Inspection Linked Permits

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Inspections & Activities* tab. Existing inspections and non-incident occupancy activities like plan reviews, public education, etc., performed at the occupancy are listed.
- Highlight inspection and press **OPEN**.
- Click the *Linked Permits* tab.
- Add a new permit or link the inspection to an existing permit:
  - To add a new permit:
    - Press **New** and complete permit details. Optionally add additional permits linked to the current permit (the *Permit No.* will be the same but the *Type* and other details will be different). Save and close when finished.
  - To link to a permit already issued for the occupancy:

    - Press **Add Link**.
    - Select a permit, then press **Link**.
- Save and close inspection record.

About Occupancy Chemical Inventories

A complete inventory of chemicals stored at an occupancy record is a valuable tool for preplans.

To Add Chemicals

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
    - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
    - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Chemical Inventory**.
    - When chemicals have already been displayed, the **Chemical Inventory** form is displayed. Press **Add**.
- Add chemical information.
    - Press **Chem Lookup** to lookup the chemical information directly from the NFIRS chemicals table, from the Cameo™ DOS or Windows (not CAMEOfm) database specified in the **Workstation Options** form, from HazMat reports added to FH incidents, or from chemicals added to other occupancies.
- Save and close chemical detail record.
- Add additional chemicals if necessary, or press **Close** if finished.

About Proximate Hydrants

A list of hydrants near to an occupancy record and whether they are functional is a valuable tool for preplans.

To Associate Nearby Hydrants with Occupancy

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
    - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
    - If the **Query** form is displayed, select the record from the list, then press **OK**.

- Click the *Additional Records* tab.
- Press **Hydrant Locations**.
  - When hydrants have already been added for the occupancy the **Nearest Hydrant Locations** form is displayed. Press **Add**.
- Type or look up the *Hydrant No.* for the hydrant located near the occupancy record. Hydrant details are displayed.
  - Optionally press **Open Hydrant Record** to make changes to the hydrant record, then press **Save**.
- Save and close **Hydrant Location** form.
- Add additional hydrants if necessary, or press **Close** if finished.

About Storage Tanks

Details about storage tanks at the occupancy site can be a valuable tool for preplans.

To Add Storage Tank Details

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Storage Tanks**.
  - When storage tank details have already been added, the **Storage Tank List** form is displayed. Press **Add**.
- Complete storage tank details.
- Save and close storage tank detail when finished.
- Add additional tanks if necessary, or press **Close** if finished.

About On-Site Materials/Products

Details about onsite materials or products is a valuable tool for preplans.

To Add Onsite Materials or Products

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.

  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Onsite Materials/Products**.
- Press + and add onsite material/product detail. Repeat for each detail.
- Press **Save** when finished.

About the Needed Fire Flow Calculation

Needed fire flow is an estimate of the amount of water that should be available for a specific occupancy. The required fire flow GPM figure is calculated based on a formula developed by ISO ("Guide for Determination of Needed Fire Flow", Edition 10-2001, 2001 ISO PROPERTIES, INC., 2001). Additional information about needed fire flow and the role of needed fire flow in ISO's Public Protection Classification (PPC) Program are available at http://www.isomitigation.com.

To Calculate Needed Fire Flow

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Needed Fire Flow** and enter information for calculating needed fire flow.
- Save and close needed fire flow.

About Occupancy Permits

Permits issued for the occupancy and whether they are up-to-date is an important tool for preplans.

To Add a Permit

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.

- If the **Query** form is displayed, select the record from the list, then press **OK**.

- Click the *Additional Records* tab.
- Press **Permits**. A list of permits is displayed or the **Permit** form is displayed. If a list of permits is displayed, press **Add**.
- Add relevant permit information.
- Optionally add additional permits to be associated with the current *Permit No*:
    - Press [+] to add a permit.
    - Press [++], highlight permit types, then press **OK** to add multiple permits.

NOTICE
Linked Permits

When permits are linked together, they are added to the occupancy as a permit and the permit details are unique, but the linked permits share a *Permit No.* value and changes to one can be applied to all linked permits.

- Save and close permit.

To Renew Expired Permit from Occupancy

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
    - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
    - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Permits**. A list of permits is displayed.
- Highlight permit to display, then press **Renew**. The **Renew Permit(s)** form is displayed.
- Select permit number:
    - Select *Auto-generate the new permit number* to allow FH to assign a new number.
    - Select *Use a specific permit number* and assign a permit number if necessary.
- Check *Use the default permit fee and calculate expiration date based on length specified in the lookup table* to use the default values for fee and permit length added to the lookup code.
- Check *Carry the notes from the current permit forward to the new permit* if desired.
- Change the *Staff ID* of the permit issuer and *Issue Date* if necessary.
- Select the permit types to renew. When a permit type is selected, all expired permits for that *Permit Type* for the occupancy are renewed.
- Press **Renew**. The *Permit Detail* form is displayed.

- Complete permit information as needed, then save and close. When there are multiple permits being renewed, you can select the permit at the bottom of the form to modify details for the highlighted permit.
- Press **Close**.

To Renew an Expired Permit Outside Occupancy

- From the **File** menu, select the **Occupancy Management** option **Batch Renew Permits** option. A list of permits that expired in the *Expiring between* date range is displayed.
- Modify the *Expiring between* start and end date and specify a *Permit Type* to limit the included expired permits.
- Check *Don't show permit if the occupancy has a newer permit of the same type* to remove expired permits from the list when a permit of the same type is issued for the occupancy.
- Click on the permit to renew.
- Press **Renew**.
- The **Renew Permit(s)** form is displayed.
- Select permit number:
  - Select *Auto-generate the new permit number* to allow FH to assign a new number.
  - Select *Use a specific permit number* and assign a permit number if necessary.
- Check *Use the default permit fee and calculate expiration date based on length specified in the lookup table* to use the default values for fee and permit length added to the lookup code.
- Check *Carry the notes from the current permit forward to the new permit* if desired.
- Change the *Staff ID* of the permit issuer and *Issue Date* if necessary.
- Select the permit types to renew. When a permit type is selected, all expired permits for that *Permit Type* for the occupancy are renewed.
- Press **Renew**. The new permit is displayed.
- Complete permit information as needed, then save and close. When there are multiple permits being renewed, you can select the permit at the bottom of the form to modify details for the highlighted permit.
- Press **Close**.

To Renew Multiple Expired Permit Outside Occupancy

- From the **File** menu, select the **Occupancy Management** option **Batch Renew Permits** option. A list of permits that expired in the *Expiring between* date range is displayed.
- Modify the *Expiring between* start and end date and specify a *Permit Type* to limit the included expired permits.

- Check *Don't show permit if the occupancy has a newer permit of the same type* to remove expired permits from the list when a permit of the same type is issued for the occupancy.
- Select expired permits:
  - Press and hold the **`Ctrl`** key and select multiple permits, then release the **`Ctrl`** key, to select multiple permits that are not listed together.
  - Press and hold the **`Shift`** key and select multiple permits, then release the **`Shift`** key, to select multiple permits that are listed together.
- Press **Renew Group**.
- The **Renew Permit(s)** form is displayed.
- Select permit number:
  - Select *Auto-generate the new permit number* to allow FH to assign a new number.
  - Select *Use a specific permit number* and assign a permit number if necessary.
- Add additional details for the renewed permit.
- Press **Renew**.
- Press **Close**.

Reviewing Incident Responses

You can review a list of incident responses to the occupancy record.

To View Incident Responses to the Occupancy

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Incident Responses**. Fire and EMS incident responses are listed.
- Press **Close**.
- Save and close occupancy when finished.

Tracking Occupancy History

You can track changes made to an occupancy record using supplementary history details. You can specify in the **Administrative Options** form *Occupancy* section to be prompted to add a supplementary history detail record when the occupancy name or building information changes.

To Add Supplementary History Detail

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Supplemental History**.
  - If supplementary history records are listed, press **Add**.
- Add supplementary history details.
- Save and close.

Reviewing Inventory Associated with Occupancy

You can review all inventory associated with an occupancy and add inventory records.

To Review/Add Inventory Associated with Occupancy

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Equipment**.
  - If inventory is associated with the occupancy, inventory is listed:
    - Press **New** to add a new inventory record linked to the occupancy. Save and close when finished.
    - Press **Add Link** to add inventory record(s). You can select multiple inventory. Press **OK** to link highlighted inventory to occupancy.

    - Highlight an inventory item and press **Remove Link** to remove the association with the occupancy (the inventory record is not deleted).
  - If no inventory is associated with the occupancy, the inventory browse listing is displayed:
    - Press **Cancel** then **New** to add a new inventory record linked to the occupancy. Save and close when finished.
    - Select inventory item(s) then press **OK** to link highlighted inventory item(s) to the occupancy. Multi-select is enabled.
- Press **Close**.

About Preplan Information & Alerts

Other preplans can include a variety of important preplan information. An area for unlimited notes is provided, so you can include information like directions, notes, or specifications. Use Special Response Codes for critical preplan information.

To Add a Preplan/Alert

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.
- Press **Add**. The **Other Preplan** form is displayed.
- Type or look up a *Preplan Code*.
- Type a description in *Details*. The text you add here is displayed in the *Details* field on the main **Occupancy** form *Additional Records* section when the preplan listing is highlighted.
- Save and close form.

To Display Detail Records from Related Property Records

See "About Multi-Occupancy Property Records" on page 129 for more information about occupancy records related by *Property ID*.

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Additional Records* tab.

- Check *Display Primary Occupancy Record(s)*. Detail records (preplans, chemicals, hydrants, on-site materials, storage tanks) from other occupancies with the same *Property ID* value are accessible from the *Additional Records* section.
- Close occupancy when finished.

About User Fields and Attachments

You can complete user fields if they have been defined for occupancy records, and attach files.

To Complete User Fields

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Other* tab.
- Press **User Fields**.
- Complete fields as needed, then save and close.

Instructions for adding user-defined fields are available in the Advanced Feature Reference 'User-Defined Fields' chapter.

- Save and close occupancy.

To Attach Files and/or Signatures

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Other* tab.
- Press **Attachments**. Add attachments, then save and close..

Press **`F1`** for additional information on using this form.

About Locking and Modification

Occupancy records can be locked from modification by non-administrative users. You can review a list of modifications made to the record.

To Lock Occupancy Record

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Other* tab.
- Press **Record Lock Status**.
- Check *Lock Record*, then press **OK**.

Press **`F1`** for more information.

- Save and close.

To Review Record Modification History

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Click the *Other* tab.
- Press **Record Modification History**. The **Record Modification History** form is displayed. The amount of information displayed depends on the level of tracking selected from the **Administrative Options** form *Database* section.
- Press **Close.**

Press **`F1`** for more information.

About Multi-Occupancy Property Records

Multi-occupancy property records are individual occupancy records that are linked together using the same *Property ID*. From a Multi-Occupancy Property record you can view all occupancy records linked to the property, all contacts and payment responsibilities (if the optional FH Accounts Receivable module is enabled), all preplan detail records, and all incident response information. You can add new occupancy records linked to the multi-occupancy property record, link additional existing occupancy records, or remove an occupancy record from the multi-occupancy property record.

NOTICE
FH 5 Records

Multi-Occupancy Property records were first added in FH 6, but multiple occupancies could be associated together using the *Property ID*. If your records originated before FH 6, the occupancy records that are associated via the *Property ID* field are not included in multi-occupancy property browse lists until one of the occupancy records is selected as a primary occupancy (Check *Primary Occupancy for Prop ID* on the **Occupancy** form *Address* section).

To Add New Multi-Occupancy Property Record (Existing Occupancy)

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the primary occupancy record from the list, then press **OK**.
- Type a *Property ID* value. You can use the *Occupancy ID*, or any unique value to identify the property (the *Occupancy Name* for the primary occupancy in a multi-occupancy property record is used in browse lists, so the *Property ID* field need not be descriptive).
- Check *Primary Occupancy for Prop ID*, then save and close occupancy record.

  Complete the steps 'To Add New Occupancy to Multi Occupancy Property Record' or 'To Link Existing Occupancy to Multi-Occupancy Property Record' to link existing occupancies to the multi-occupancy property records.

To Add New Occupancy to Multi-Occupancy Property Record

- From the **File** menu, select the **Occupancy Management** option **Multi-Occupancy Properties** option.
  - If the **Multi-Occupancy Property** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Press **New** next to **Add Link**.
- Complete the occupancy record values as needed.
- Save and close occupancy.

To Link Existing Occupancy to Multi-Occupancy Property Record

- From the **File** menu, select the **Occupancy Management** option **Multi-Occupancy Properties** option.
  - If the **Multi-Occupancy Property** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.

- If the **Query** form is displayed, select the record from the list, then press **OK**.

- Press **Add Link**. The **Query** form is displayed.
- Select the occupancy to link to the multi-occupancy property, then press **OK**.
- Close when finished.

To Remove Occupancy from Multi-Occupancy Property Record

- From the **File** menu, select the **Occupancy Management** option **Multi-Occupancy Properties** option.
  - If the **Multi-Occupancy Property** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Highlight occupancy to remove from multi-occupancy property record, then press **Remove Link**. The occupancy is removed from the multi-occupancy property record but not deleted.
- Press **Close** when finished.

To Review All Contacts, Preplans, and Responses

- From the **File** menu, select the **Occupancy Management** option **Multi-Occupancy Properties** option.
  - If the **Multi-Occupancy Property** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.
- Press the *All Contacts*, *All Preplan*, or *All Incident Responses* tabs to review contact, preplan, or response information.
- Press **Close** when finished.

Chapter 10

NFIRS Incident Reporting

FH performs extensive validation throughout the incident report entry. Below are descriptions of each required and optional data element.

There are some conventions used in this chapter to highlight important information.

Understanding NFIRS 5.0 Incident Reports

The NFIRS 5.0 incident report is made up of a collection of sections (NFIRS calls these "modules") that gather specific incident related information. The sections required to complete an incident report vary based on what type of incident is indicated. The *Basic* section is required for every incident. Entries in the Basic section determine what other modules need to be completed based on the type of incident involved. For example, all types of incidents require the *Basic* section, but only fires require additional reporting using the *Fire* section (NFIRS-2) and/or Structure Fire section (NFIRS-3).

NOTICE
Color Coding

FH automatically indicates required, optional, and inapplicable sections using color coding and disabling inapplicable sections, so you do not need to know when specific sections are required. The information below is for your reference.

Below is a matrix representing what sections (NFIRS calls these "modules") are required based on incident type (entered in the *Basic* section of the incident form).

	Basic (described page 136)	Fire (described page 153)	Structure (described page 153)	Wildland (described page 160)
Buildings – 111	X	X	X	
Special Structure/Not a Building – 112	X	X	X	
Confined Fire Within Structure – 113-118	X			
Mobile Property Used as Structure – 120-123	X	X	X	
Vehicle – 130-138	X	X		
Vegetation, Not Cultivated – 140-143	X	X*		X*
Outside Rubbish – 150-155	X			
Special Outside Fire – 160-164	X	X		
Cultivated Vegetation – 170-173	X	X		

* Either Fire or Wildland

The Civilian Fire Casualty Module (NFIRS-4) and the Fire Service Casualty Module (NFIRS-5) are required when there are casualties associated with a fire incident. The Fire Service Casualty Module should also be completed when there are fire service casualties at all other incident types as well.

Optional modules include the EMS, hazmat, Wildland Fire, Apparatus and Personnel, and Arson Modules. The type of incident reported or the nature of a particular incident, such as the release of hazardous materials at a fire after the arrival of the fire department, may trigger one or more of these additional modules if your fire department is using these options. The amount of information needed in each module varies based on the type of incident, associated casualties, and property losses.

Standard Lookup Code Entries

There are a few conventions for entering lookup codes that will assist you in reporting.

Keyboard Shortcuts are available for certain lookup-driven fields.

F5 "Unknown/Undetermined"
F6 "Not Applicable"
F7 "None"
F8 "Not Assessed"
F9 "Not Classified"

- The letter “N,” “NN,” or “NNN” is used to indicate None in a field that is normally coded. If the field is a numeric field such as dollar loss, 0 (zero) is used to indicate none.
- The letter “U,” “UU,” or “UUU” is used to indicate Unknown or Undetermined in a field that is normally coded. The coded field should not be left blank as that is an indication that the person completing the report missed it or forgot to fill it out. Numeric fields such as dollar loss can be left blank if a value is not known.
- The number “0,” “00,” or “000” is a valid code for many coded fields. It is the value for *Other* and is intended to be used where the item or issue being coded is identifiable but the code selection list does not contain the description of what you have identified. In some data elements there are codes ending in “0” that allow for further identification of the item or issue. For example, where you know part of the answer but not enough to code it at the specific level required by the options in the list.

Adding NFIRS 5.0 Incident Reports

Details for entering a NFIRS incident follow.

To Create a New Basic Incident

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Reports** option.
    - If the **NFIRS Incident Report** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
    - If a blank **NFIRS Incident Report** form is opened, you are ready to enter a new staff member.
    - If the default query for selecting **NFIRS Incident Reports** is displayed, press **Cancel**.

  Basic information shared throughout all areas of the fire incident report are displayed in the form header.

- *FDID* is automatically entered based on the station indicated on the **Workstation Options** form *Workstation Location* field (*FDID* is associated with *Station*). *FDID* is a unique identifier assigned by the state to identify a particular fire department within the state. FDID may also identify the county, fire district, or other jurisdiction in which the fire department is located. Many states use the two left-most digits to identify the particular department within a jurisdiction. *FDID* is five digits.
- Type the month, day, and year of the incident in *Alarm Date*. This date is when the alarm was received. The *Alarm Date*, in conjunction with the other required fields (*FDID*, *Alarm Time*, *Incident Number*), uniquely identifies each incident. If incidents with the same *Alarm Date* exist, you are prompted to select an incident or to add a new incident. press **New**.

NOTICE
Exposures

If this is an exposure, note the *FDID*, *Alarm Date*, *Alarm Time*, and *Incident Number* values of the *1XX Incident Type* the incident is an exposure to. There must be a base *1XX Incident Type* incident to add an exposure to. Type the *FDID*, *Alarm Date*, *Alarm Time*, and *Incident Number* of the base incident, then press **New Exposure** when prompted. A separate sequential exposure number is assigned to each exposure. The original incident is always coded “000”, while exposures are numbered sequentially beginning with "001". The relevant data for each exposure should then be recorded using the appropriate section. Note: Treat similar items in a group as a single exposure (such as a fleet of cars).

- Type the *Alarm Time* that the alarm was received. Use military time. Required for all incidents.
- Type the *Incident Number*, or press **Tab** to allow FH to assign the next available number if auto-numbering is enabled. This number is used to identify a particular incident and to tie data from different modules together. Enter the number assigned to the incident. It may be necessary to obtain this number from an alarm or dispatch center.
- Type or lookup the *Station* code. This is a local option. Provides a means of tracking incident data that has been collected and reported by individual stations. Specific feedback on incident experience can then be prepared and sent to individual stations. Station number is also useful for analyzing different levels of activity within a fire department.
- Type or lookup the *Occupancy ID* for the occupancy record where the incident occurred. When you select an existing occupancy, address and building information from the occupancy record is added to the incident and can skip to the *Incident Type* field. Address fields are disabled when an *Occupancy ID* is used unless specified otherwise in the **Administrative Options** form *Incident* section *All Incidents* section.
- Select *Address Type*, which may be a street address, an intersection of two roadways, or directions from a recognized landmark. Incident address information is required to establish a legal report reference. This information may also be useful for identifying local problems, such as checking for multiple incidents at the same location. If the incident is a Wildland fire, *Rural/Directions* should be selected, and you can check *Address on Wildland Report* to use the address entered on the Wildland Report.
    - If you select "Street Address":
        - Type the *Number* of the specific location where the incident occurred. This number is part of the address information where the incident occurred. For structures and lots, enter the street number. For highways, railroads, etc., enter the mile-post number. For block addresses, enter the block number.
        - Type or lookup the *Prefix*, *Street/Highway*, *Type*, *Suffix* values for the incident.
        - Type the *Apt/Room/Suite* number where the incident occurred (any combination of numbers and letters). This number is part of the address information when the incident occurs within an apartment, suite, identifiable room or area generally rented or leased. Leave blank if not applicable.

NOTICE
Use Sparingly

Use “Intersection” ONLY if the location cannot otherwise be identified.

- If you select “Intersection”:
  - Type or lookup the *Prefix*, *Street/Highway*, *Type*, *Suffix* values for the incident.

NOTICE
Use Sparingly

Use “Rural” ONLY if the location cannot otherwise be identified.

- If you select “Rural/Directions”:
  - Type *Directions* to the incident location.
- If you select “National Grid”:
  - Type the *National Grid Location* value for the incident location.

- Select an additional descriptor for specifying the incident location for *Vicinity*.
- Type or lookup the *City*, *State*, and *ZIP/Postal Code* where the incident occurred. *City* is the first of three fields that are part of a single lookup. If the incident occurred in an unincorporated area, use the city found in the mailing address for the incident location. The state or province may be different from the state or province where the fire department is located. *ZIP/Postal Code* completes the full address of the incident and provides a means of linking fire incident data to other geographic and population factors for comparative analysis at the local and regional levels.
- Optionally complete supplemental address information:
  - Press **Supplemental Address**.
  - Type or lookup the *Latitude* and *Longitude* of the incident address. These values, if available, ensure the most accurate plotting for mapping.
  - Complete remaining fields as needed.
  - Press **OK** to save supplemental address.
- Type or lookup the *Aid Given or Received* status. If mutual aid is received (1 or 2), mutual aid details are optional. If mutual aid is given (3 to 5) mutual aid details are required and street, city, state and ZIP validation is relaxed to allow entries outside your standard entries.

See "To Complete Aid Given/Received" on page 140 for more information.

- Type or look up a *Specific Use* code to indicate the property use where the incident occurred. Use code 419 for mobile homes that are used primarily as fixed residences. If the mobile home is in transit, use the code describing the property where the mobile home is located at the time of the incident. If the property use code falls in the 500, 600, 700, or 800 series, "On-Site Materials or Products" are required in the Fire Report if the incident is a fire.

See "Add Fire Report" in this chapter on page 153.

- Type or lookup the *Incident Type* code for the actual situation that emergency personnel found on the scene when they arrived. These codes include the entire spectrum of incidents the fire department responds to from fires to EMS to public service. The incident type reported here is not always the same as the incident type initially dispatched. *Incident Type* identifies the various types of incidents to which the fire department responds and allows the fire department to document the full range of incidents it handles. This information can be used to analyze the frequency of different types of incidents, provide insight on fire and other incident problems, and identify training needs. Generally select the type of incident found when emergency personnel arrived at the scene, but if a more serious condition developed after the fire department arrival on the scene, that incident type should be reported.

  The codes are organized in a series, as shown below:

Series Heading	
100	Fires
200	Overpressure Rupture, Explosion, Overheat (no ensuing fire)
300	Rescue & Emergency Medical Services (EMS)
400	Hazardous Conditions (No Fire)
500	Service Calls
600	Good Intent Calls
700	False Alarm & False Calls
800	Severe Weather & Natural Disasters
900	Other Type of Incidents

  In general, use the lowest numbered series that applies to the incident. You will have an opportunity to describe multiple actions taken later in the report.

- Complete **Times** area fields. Dates for each completed time field default to the *Alarm Date* value and can be modified by pressing the lookup button to the right of the time field.
  - Type the time the dispatch center was notified for *Dispatch Notif*. Leave empty if not used.
  - Type the *First Arv Scene* time. Arrival time should be the same as *Last Clr Scene* if cancelled on the way to a call. If *Alarm Time* is before midnight and the *First Arv Scene* is after midnight press the *First Arv Scene* lookup and select the correct date. Required for all incidents.

  - Leave *Controlled* time blank except for fires. For fires, enter the date and time that the fire was determined by the incident commander to be under control. If *Alarm Time* is before midnight and *Controlled* is after midnight press the *Controlled* lookup and select the correct date. Required for wildland fires; optional for other fires; otherwise leave blank.
  - Type the *Last Clr Scene* and time. If *Alarm Time* is before midnight and the *Last Clr Scene* is after midnight press the *Last Clr Scene* lookup and select the correct date. Required for all incidents. If cancelled enroute, enter the time of cancellation.
- Press + and type or lookup an *Actions Taken*. Select an *Actions Taken* code that best describes the most significant action taken during the incident. Only one entry is required and up to three are included in exports. If cancelled enroute, use code "93".
- Type or lookup the *Shift* designation corresponding to the work shift during which the alarm occurred. Local option.
- Enter the number of *Alarms* transmitted for this incident. Local option.
- Enter the *District* number identifying the fire department district in which this incident occurred. Local option.
- Complete additional *Basic* section fields as needed.

About Responding Personnel and Units

Responding unit records include elements from the optional Apparatus & Resource Module (NFIRS-9) in the NFIRS specification and is used to help manage and track apparatus and resources used on incidents. We recommend adding units and personnel now since they may be used in other areas of the incident.

Multiple staff activities for a single incident are useful for separating distinct activities that occur on different dates and times, like emergency response, and follow-up investigation of the incident.

To Complete Aid Given/Received Details

- From the **File** menu, select the **NFIRS Incident Reporting** option **NFIRS Incident Reports** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Press **Aid Given/Received Details** to display a listing of mutual aid given or received. Press **Add** or **Add Group**. The **Aid Given or Received Detail** form is displayed.

- Type or lookup the *Department/Unit Code* for the department or unit that either provided or received mutual aid. Note that additional data elements required for mutual aid given or received departments are added as part of the *Department/Unit Code* lookup setup.
- Complete **Response Times** area fields. The date associated with each completed time field defaults to the *Alarm Date* value and can be modified by pressing the lookup button to the right of the time field.
- Complete **Resources** area fields. If you give aid, you may choose to report your own resources. Similarly, if you receive aid, you may choose whether to count only your own resources or those of the aid-giving department, as well.
  The aid-receiving department should always report all casualties other than the fire service casualties of the aid-giving department. Each department reports its own fire service casualties.
- Type *Their Incident Number*. If you gave aid to another fire department enter the incident number assigned to the incident by that department.
- Save and close mutual aid record. The **Aid Given or Received** list is displayed. Press **Close** to return to the **NFIRS Incident Report** form.
- Save and close record.

To Add Multiple Responding Units

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the default query for selecting NFIRS Incident Reports is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Press **Add Group**.
  - If you use station roster & availability or the optional staff scheduling module, select “All units for <station> (as entered in the station roster or via staff scheduling), or select “Unit code lookup” and select the units to add then press **OK**. The **Unit Group Add** form is displayed.
  - If you do not use station roster & availability or the optional staff scheduling module, the **Lookup - Units** form is displayed. Select units to add then press **OK**. The **Unit Group Add** form is displayed.
- Complete **Unit Group Add** form *Basic* section values. These values are applied to all responding unit detail records:
  - Type or look up the *Response Code* that best describes the nature of the unit’s response.

- Check appropriate *Fire/Medical/Rescue/Other* types to indicate the main use of this apparatus at the incident. The main use at the incident need not be the consistent with the apparatus type. For example, EMS may be the principal use of the members arriving on-scene in a ladder truck. Required for all incidents.
- Complete **Response Times** area fields. Dates for each completed time field default to the *Alarm Date* value and can be modified by pressing the lookup button to the right of the time field. Check *Cancelled* and type the time the unit was cancelled if relevant.
- Press **Unit Incident Actions Taken** to add action taken codes.
    - Select codes then press **OK.**

- Click the *Personnel* tab.
    - Select the *Personnel for Unit*. Staff is added to the current unit only.
    - Press **Add** or **Add Group** to add personnel.
        - If you use station roster & availability or the optional staff scheduling module, select "All units for <station> (as entered in the station roster or via staff scheduling), or select "Unit code lookup" and select the units to add then press **OK**. The **Unit Group Add** form is displayed.
        - If you do not use station roster & availability or the optional staff scheduling module, the **Lookup - Units** form is displayed. Select units to add then press **OK**. The **Unit Group Add** form is displayed.
    - Add personnel for each responding unit.
- Optionally complete equipment usage details:
    - Click the *Usage* tab.
    - Select the *Equipment Usage for Unit*. Usage added is applied to the current unit only.
    - Press **Add Linked** to add a usage detail for the equipment associated with the *Unit*. Complete usage details, then save and close.
    - Press **Add Other** to select from available inventory. Highlight an inventory record or multiple records, press **OK**, then complete usage details. Save and close inventory usage detail when finished.
- Optionally complete unit narrative:
    - Uncheck *Apply this narrative to all selected units* to add a narrative for a specific unit, or leave it checked and add a narrative that will be added to each unit response.
    - Add narrative.
- Optionally add EMS Search & Rescue response times:
    - Click the *EMS Search & Rescue* tab.

- Press **OK**. Responding units are added. If *Continue to the Unit Response Detail form* was checked, the **Unit Response Detail** form is displayed and you can add or edit individual unit response details.
- Save and close incident when finished.

To Add a Single Responding Unit

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the default query for selecting NFIRS Incident Reports is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Press **Add**.
  - If you use station roster & availability or the optional staff scheduling module, select the available unit (as entered in the station roster or via staff scheduling), or if the unit to add is not listed, select "Unit Lookup..." and Type or look up the **Unit Response Detail** form *Unit Code* value.
  - If you do not use station roster & availability or the optional staff scheduling module, the **Unit Response Detail** form is displayed. Type or look up the *Unit Code*.
- Complete **Unit Response Detail** form values.
  - The *Resource Type* code is usually associated with the *Unit*. Required for all incidents.
  - Type or look up the *Response Code* that best describes the nature of the unit's response.
  - Check appropriate *Fire/Medical/Rescue/Other* types to indicate the main use of this apparatus at the incident. The main use at the incident need not be the consistent with the apparatus type. For example, EMS may be the principal use of the members arriving on-scene in a ladder truck. Required for all incidents.
  - Complete **Response Times**. The date associated with each completed time field defaults to the *Alarm Date* value and can be modified by pressing the lookup button to the right of the time field. Check *Cancelled* and type the date and time the unit was canceled if relevant.
  - Press **Response Time Analysis** to review elapsed times between completed date and time fields. Press **OK** to close.
  - Press **Unit Actions Taken** to add codes for additional actions taken. Press **Save** to close.
  - Click the *Personnel* tab.

NOTICE
Add One Staff Member

You can add staff one at a time by pressing **Add** and the **Participant Detail** form is displayed.

    - Press **Add Group**.
        - If you want to select the staff using the staff group select method, select “Staff Group Select...”. The **Staff Group Select** form is displayed. Select staff members responding to the incident, then press **OK**.
        - If you want to add staff added to the unit from the optional staff scheduling, select “Add From Scheduling...”.

NOTICE
FH Staff Scheduling Tip

In certain circumstances, a unit will respond that has no staff assigned to it in FH Staff Scheduling (the staff are assigned to another unit and respond on the other unit in certain circumstances). For example, if all staff are assigned to unit ‘A’ but unit ‘B’ responds in limited circumstances, and unit ‘B’ responds, adding the unit via “Add from Scheduling...” will result in no personnel. In this instance, the person entering the incident can add the unit from scheduling, then from the *Personnel* section add personnel using the “Add from Roster” method and selecting unit “A” personnel that responded on unit “B”.

        - If you want to add staff added to the unit from the station roster, select “Add From Roster...”.
    - The **Staff Activity - Group Add** form is displayed.
    - Add or modify group participant details, then press **OK** to add selected staff with participation details to the unit response record.

NOTICE
Staff Details

Individual staff member can be modified. For example, you can add a staff member in this manner, and modify the individual participation detail record to exclude response on a particular unit. All participant detail records are automatically added to a staff activity record.

- Optionally add equipment usage. Click the *Usage* tab, then:
    - To add a usage record for the responding unit, press **Add Linked**. Note that current mileage and hour meter readings should be entered.
    - To add a usage/purchasing detail record for a different piece of equipment, press **Add Other** then select the record to add. Note that the number of miles and hours to add to the equipment record should be entered (not the miles and hours displayed on the equipment meters).
    - Save and close usage record.
- Optionally add unit narrative. Click the *Unit Narrative* tab then type narrative.

- Optionally add EMS/Search & Rescue response information. This information is added to EMS/Search & Rescue incident patient records for the unit if an EMS incident is created from this NFIRS incident. Click the *EMS/Search & Rescue* tab and patient information.
- Optionally complete user fields, attachments and signatures, and other actions for the unit response. Click the *Other* tab and complete as needed.
- Press **Save**.

  All units added for the incident are listed in the lower right area of the *Basic* section, and if necessary an additional unit can be added by pressing **+** and a listed unit can be removed by highlighting the unit and pressing **-**.

To Edit a Single Responding Unit

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Highlight the responding unit to edit.
- Press **Open**. The **Unit Response Detail** form is displayed.
- Change values as needed.
- Save and close.

To Edit All Responding Units

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the default query for selecting NFIRS Incident Reports is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Press **Open All**. The **Unit Response Detail** form is displayed. All units added for the incident are listed in the lower right area of the *Basic* section, and if necessary an additional unit can be added by pressing **+** and a listed unit can be removed by highlighting the unit and pressing **-**.
- Change values as needed.
- Press **Apply to All**, check the fields with values that should be applied to all units, then press **OK**.
- Save and close.

To Add Staff Activities

NOTICE
Non-Response Related Activities

Staff added from responding units are listed here. You can add additional staff if necessary. To add activities for incident-related activities that are not specifically incident response activities should be added from the **NFIRS Incident Report** form *Additional Reports* section **Staff Activities** button. Incident-related activities that are nor incident response related are not displayed in the *Units & Personnel* section.

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the default query for selecting NFIRS Incident Reports is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Press **Add** to add a single staff member to the activity. The **Participant Detail** form is displayed.

You can also add multiple staff at one time using the **Add Group** button. More information on adding groups is listed on page 88.

NOTICE
Multiple Activities For One Individual

A single participant can be added to a staff activity more than one time as long as a different *Activity Code* is used. This allows you to track different types of activities at the scene for a single staff member.

- Type or look up the *Activity Code* for the activity. The description is automatically filled in with the description associated with the activity code.
- Type or look up the *Station*, *Shift*, and *Unit* codes for staff member's to be added to the activity. If most staff share a particular station, shift, or unit, use these fields. These fields can be left empty.
- The values you add to the *Hours Worked* fields are added to each staff member record added.
- The values you add to the *Credits Points* fields in this section are added to each staff member record added.
- Complete **Payroll Calculation** information.
  - The *Hours Paid* values you add to the fields in this section are added to each staff member record added.
  - Type or look up a *Pay Scale* code to apply to each staff member added to the activity. When a pay scale code is included, the dollar amount associated with the pay scale code will be credited to the staff member and hours paid times the staff member's default hourly rate will be ignored. Additional pay options are available:

- Check *Credit Both Hours Paid and Pay Scale* to calculate pay by multiplying hours paid by the staff member's default hourly rate, plus the amount associated with the pay scale code.
    - Check *Use Pay Scale as the Hourly Rate* to use the amount associated with the pay scale code and multiply it by hours paid (staff member's default hourly rate is ignored).
- Add additional information as needed. Save and close when finished.

About Incident Response Information

Enter NFIRS 5.0 Fire incident response information.

To Add Incident Response Information

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
    - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
    - If the default query for selecting NFIRS Incident Reports is displayed, you are ready to select an incident then press **OK**.
- Click the *Response* tab.
- Check *Count from detail forms* to skip the area below and count resources (apparatus and personnel) from the detail forms *(Units & Personnel* section). If you do not add units and personnel and *Count from detail forms* is not checked:
    - Type the number of fire apparatus and vehicles, excluding EMS vehicles that responded from your department in *Suppression Apparatus*.
    - Enter the number of fire personnel that responded from your department, other than personnel responding in EMS vehicles, in *Suppression Personnel*.
    - Enter the number of EMS vehicles that responded from your department in *EMS (ALS/BLS) Apparatus*. Include Advanced Life Support and Basic Life Support units.
    - Enter the number of personnel that responded to this incident in EMS vehicles in *EMS (ALS/BLS) Personnel* .
    - Enter the number of Rescue/Crash vehicles that responded from your department in *Rescue/Crash Apparatus*.
    - Enter the number of personnel that responded to this incident in rescue/crash vehicles in *Rescue/Crash Personnel*.
    - Enter the number of units not in the above categories that responded to this incident in *Other Apparatus*. Chief officer vehicles and personnel from privately owned vehicles should be considered as *Other Apparatus*.

    - Personnel arriving in *Other Apparatus* should be classified according to their main use at the incident. Enter the number of personnel not in the above categories that responded to this incident.

  Classify your apparatus and personnel based upon their main USE at the incident. An engine that responds to an EMS call should be classified as an EMS vehicle.

- Check *Counts include aid received resources* if you receive aid and you choose to count the resources of all responding departments.
- Complete *Estimated Dollar Losses & Value* fields. All that is required is an estimated dollar loss, not an absolute accounting. Insurance companies and property owners will get their own independent estimates of the loss as necessary. These entries are intended for use by your department, your state, and the federal government to establish broad categories of dollar losses. Property owners and managers can help with estimates. These estimates are not intended to be legally binding in any way.
    - If the building, other structure, outside property or vehicle (for vehicle fires) sustained damage in this incident from flame, smoke, suppression efforts, or otherwise, enter your estimate of the loss in whole dollars in *Property Loss*. Exclude from this amount the estimated loss to building contents or other structure contents; enter contents losses separately in the space provided later in this section. Required for all fires (Incident Types 100-173) whenever dollar value of property loss (excluding contents) if known.
        - Check *$0* if there is no loss in this area.
    - If contents of a building, other structure, or vehicle (for vehicle fires) sustained damage in this incident from flame, smoke, suppression efforts, or otherwise and those contents had value (not trash or other valueless materials), enter your estimate of the loss in whole dollars in *Contents Loss*. Required for all fires (Incident Types 100-173) whenever dollar value of contents loss if known.
        - Check *$0* if there is no loss in this area.
    - Enter your *Property Value* estimate of the property value prior to the incident, excluding contents, based upon available information (for example, the owner).
        - Check *$0* if there is no loss in this area.
- Enter your estimate of the *Contents Value* prior to the incident based upon available information (for example, the owner). Local option.
        - Check *$0* if there is no loss in this area.
- In mutual aid situations, each department reports its own fire service casualties. Only the receiving department reports other casualties. Check *No Casualties* to indicate that there were no fatalities or injuries to either fire fighters or other persons. If casualties are reported:

- Enter the number of *Fire Service Casualties – Deaths* from your department who died in connection with this incident.
- Enter the number of *Fire Service Casualties – Injuries* your department who were only injured in connection with this incident.
- Enter the *Civilian Casualties – Deaths* of persons who died in connection with this incident other than fire service personnel.
- Enter the *Civilian Casualties – Injuries* of people who were only injured in connection with this incident other than fire service personnel.
- Type or look up a *Detector Alerted Occupants* code to indicate if a detector alerted occupants in this incident (regardless of detector type, including smoke, carbon monoxide, etc.). Required for all confined fires (Incident Type 113-118). Blank means that the incident type was one for which detector operation would not apply.

About Incident Property Information

Incident property information includes hazardous materials release, mixed property use, and weather information. When an Occupancy ID is used, the mixed property use value from the occupancy is used.

To Add Incident Property Information

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Property & Involvement* tab.
- Type or look up a *Hazardous Materials Release* code to indicate the type of hazardous materials (if any) involved in this incident.

NOTICE
HazMat Report

You should complete the **Hazardous Materials** form if required by your state or local jurisdiction. Otherwise, a **Hazardous Materials** form is NOT necessary. A **Hazmat Report** form (found in the *Additional Reports* section) is required whenever the code "0" (Special hazmat actions required or spill >55 gallons) is selected regardless of incident type.

- Type or look up a *Mixed Use* code to indicate if the incident occurred at one of the listed mixed use properties; or type "NN" (Not Mixed Use). Add a code even if the incident did not involve the entire complex (for example a single store in a mall).

- Press **Weather** to complete weather information (may be used in the **Wildland** report if this is also a wildland fire - see **Wildland** report page 160 for details).
- Save and close record.

About Involvements

The name of the person involved in the incident is needed for legal reference. The name also provides a basis for long-term analysis in recognizing patterns of repeated incidents involving the same individual or entity in the same or different locations over time.

To Add Incident Involvement Information

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Property & Involvement* tab.
- Press **Add**. The **Involvement** form is displayed.
  - Enter an individual *Last Name* or the manager/owner of the business specified in *Business Name*, if any, without regard to whether *Address same as Incident Address* is checked.
  - Check *Address Same as Incident Address* to add incident address values.
  - Enter a *Business Name*, if applicable, without regard to whether *Address Same as Incident Address* is checked.
  - Add additional information as needed.
- Press **Save**.
- If there are additional persons involved, press **New**, otherwise press **Close**.

About Fire Reports

The **Fire Report** form is required many of the incident types between 100-173. The **Wildland Fire Report** can be used in place of the **Fire Report** for certain incident types.

Completing the **Fire Report** form for incident types 113-118 (Confined Fire Within Structure) and 150-155 (Outside Rubbish) is optional. NFIRS 5.0 does not required it with these incident types.

Wildland Fire Reports are discussed in this chapter on page 160.

To Add Fire Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Additional Reports* tab.
- Press **Fire**. The **Fire Report** form is displayed.
- Enter the estimated total number of residential living units in *Number of Residential Living Units*, whether or not all units became involved or were occupied at the time of the fire. Check *Not Residential* if the fire did not occur in residential property.
- Enter the total *Number of Buildings Involved* in the fire. This total should include all building exposures. Check *No Buildings Involved* If there were no buildings involved.
- Enter the number of *Acres Burned* in this fire if at least one acre burned. Otherwise, check *None* or *Less than One Acre*.
- If *Property Use* is in the 500s, 600s, 700s, or 800s, on-site materials or product fields are required.
  - Check *None* in the **On-Site Materials or Products** area to indicate that no significant amounts of commercial, industrial, agricultural, or energy products or materials were stored on this property. If any of these products or materials were present, whether or not they became involved, do not check this box; complete the rest of this section.
  - Press + to add **On-Site Materials or Products**. For each material/product add:
    - Type or look up a *Code* for any significant amount of any material stored, processed or sold at the property involved without regard to whether the material was involved in the fire. While **On-Site Materials or Products** should be entered for stores, manufacturing, and storage facilities, you can code materials that might not ordinarily be found at a location. Required for all fires in the applicable *Property Use* range unless *None* is checked.
    - Type or look up a *Use* code to indicate whether the material is stored, processed, sold, or repaired at the property.
- Click the *Fire* tab.
- Type or look up *Area of Fire Origin* code.
- Type or look up the *Heat Source* code and descriptor that ignited the *Item First Ignited* and caused the fire.
- Type or look up the *Item First Ignited* code that best describes the item first ignited by the heat source.
- Check *Fire spread was confined to object of origin* to indicate that the fire spread was confined to the object of origin.

- Type or look up the *Type of Material First Ignited* code. Required if the *Item First Ignited* code is in a range from 00 to 69.
- Type or look up a *Cause of Ignition* code.
- Type or look up *Factors Contributing To Ignition*. Required if the fire cause is not "Intentional" or "Under Investigation" unless *None* is checked.
- Type or look up applicable *Human Factors Contributing To Ignition* codes. Check *None* and skip to the next section if none are applicable.
- Type or look up applicable *Fire Suppression Factors* codes.
- Click *Equipt & Mobile Property* tab.
- Enter *Equipment Involved* codes that best describe the equipment involved in the ignition. If no equipment was involved in ignition, check *None*.
- Enter the *Brand* name of the equipment involved, if known. This refers to the name that the equipment is most commonly known by. This information can be quite useful nationally for product recalls.
- Type or look up the *Model* number of the equipment involved, if known. This refers to the model name or number assigned to the equipment by the manufacturer.
- Type the *Serial Number* of the equipment involved in ignition, if known. This refers to the manufacturer's serial number that is usually stamped on an identification plate.
- Enter the model *Year* of the equipment involved, if known.
- Type or look up the *Equipment Power Source* code that best describes the power source of the equipment involved in ignition.
- Type or look up the *Equipment Portability* code that best indicates the portability of the equipment involved in ignition of the fire.
- Type or look up the *Mobile Property Involvement* code indicating whether mobile property was involved.
- Type or look up a *Mobile Property Type* code that best describes the type of mobile property involved and the written description is automatically inserted. Note that the codes are organized into categories for Ground, Rail, Air, and Water vehicles.
- Type or look up a *Mobile Property Make* code that describes the make of the mobile property involved and the written description is inserted in the blank. If the make needed is not found, enter "00".
- Type the manufacturer's *Model* name. If one does not exist, use the common physical description of the property, like "four-door sedan."
- Type the *Year* the mobile property was manufactured, if known.
- Type the *License Plate* number, if any, of the mobile property involved.
- Type or look up the two-letter *State* abbreviation, province or territory identified on the license plate or registration of the mobile property.

- Type the manufacturer's *VIN Number* (Vehicle Identification Number) that is generally stamped on an identification plate on the mobile property.
- Click *Other Reports* tab.
- Use the *Local Use* section to indicate if other reports exist associated with this incident that are not NFIRS based.
- Save and close record.

About Structure Fire Reports

A **Structure Fire Report** is required for all structure fires. A structure is an assembly of materials forming a construction for occupancy or use to serve a specific purpose. This includes, but is not limited to, buildings, open platforms, bridges, roof assemblies over open storage or process areas, tents, air-supported structures, and grandstands. When accessible, it is required.

To Add Structure Fire Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click *Additional Reports* tab.
- Press **Structure Fire**. The **Structure Fire Report** form is displayed.
- Type or look up the *Structure Type* code that best indicates the type of structure involved in the fire. Required for all structure fires.
- Type or look up the *Building Status* code that best indicates the status of the structure. Required for all building fires.
- Type the *Stories at or Above Grade* value. Do not count normally inaccessible attics or the roof. Required for all building fires.
- Type the *Stories Below Grade* value. Required for all building fires.
- Complete the **Main Floor Size** area fields:
  - Type the *Total Sq Ft* or,
  - type the *Length in Ft* and the *Width in Ft*. The *Total Sq Ft* is calculated for you.
- Type the *Story of Fire Origin*. This number is assumed to be at or above grade UNLESS *Below Grade* is checked. Count the ground floor as story 1. In the case of most residential basements, you would enter 1 for story of origin and then check *Below Grade*.

- Type or look up the *Fire Spread* code that best indicates the spread of the fire. Choose the highest number code that applies. Required for all building fires unless *Fire spread was confined to object of origin* is checked in the **Fire Report** form *Fire* section.

Fire reports are detailed on page 153.

- Complete the **Number of Stories Damaged by Flame** area:
  - Type *Minor/Significant/Heavy/Extreme* values for the stories that suffered flame damage in the percentage range specified. If the roof was the only part of the structure that burned, count it as part of the top story.
- Check *Check if no spread OR same as material first ignited OR unable to determine* if appropriate then skip to the Detectors & Extinguishment section. If not checked, complete the **Material Contributing Most to Flame Spread** area.
  - Type or look up the *Item Contributing Most to Flame Spread*.
  - Type or look up the *Type of Material Contributing Most To Flame Spread*. Required if "item contributing most to flame spread" code is less than 70.
- Click the *Detectors & Extinguishment System* Tab
- Type or look up a *Presence* code to indicate the presence or absence of detectors. Required for all building fires.
- Type or look up the *Detector Type* code that best indicates the type of detector present in the area of fire origin.
- Type or look up the *Power Supply* code indicating the type of power supply used by the detector.
- Type or look up the *Detector Operation* code that best describes the operation of the detector. This field is to be used only if the fire was within the designated range of the detector.
- If detector operated indicated in *Detector Operation*, then Type or look up a *Detector Effectiveness* code to indicate effectiveness. Used whenever detector operated.
- If you indicated "Failed to operate" under *Detector Operation*, then Type or look up the *Detector Failure Reason* code indicating the reason for failure. Used whenever detector failed to operate.
- Type or look up the *Presence* code to indicate the presence or absence of an automatic extinguishment system. If "Present", complete the remainder of the section. If "None Present," skip remaining part of structure fire. Required for all structure fires.
- Type or look up a *Extinguishment System Type* code only if the fire was within the designed range of the AES.
- Type or look up a *Extinguishment System Operation* code only if the fire was within the designated range of the AES.
- Type the total *Number of Heads Operating* during the fire. This field is used if the sprinkler system activated.

- Type or look up a *Extinguishment System Failure Reason* code that describes why the automatic extinguishment system failed to operate or did not operate properly. This field is used if the system failed to operate effectively.
- Save and close when finished.

About Fire Casualty Reports

A **Civilian Casualty Report** is required for each civilian casualty indicated. A **Fire Service Casualty** report is required for each fire service casualty indicated.

To Add Civilian Fire Casualty Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click *Additional Reports* tab.
- Press **Civilian Fire Casualty**. If a listing of civilian fire casualty reports is displayed press **Add**. The **Civilian Fire Casualty Report** form is displayed.
- Press **Add from Occupancy** to add an occupancy or owner if available from the **Occupancy** record, or press **Add from Involvement** to add information from an involvement. If the casualty is not available from these sources, complete the fields below.
  - Type the *Last Name* of the injured person, and any additional known name fields.
  - Enter either the age in *Years* and *Months* or the *Date of Birth*. Record the age in months only for infants (under one year).
  - Type or look up *Gender*. Required.
  - Type or look up the *Race* code. If the race is not known, press **`F5`**.
  - Type or look up *Ethnicity* code. If the ethnicity cannot be determined or is not listed, leave this element blank.
  - Type or look up the *Affiliation* code.
  - Specify the injury date and time. Check *Same as Alarm* to enter alarm date. Note that the date and time could be before or after the alarm time shown on the *Basic* section of the main incident form.
  - Type or look up a *Severity of Injury* code to best indicate the severity of the injury. Required.

- Type or look up a *Cause of Injury* code that best indicates the main cause of injury.
- Type or look up *Human Factors Contributing to Injury* codes.

- Click the *Injury* tab.
- Complete **Factors Contributing to Injury** area:
  - Type or look up a *Code* that best describes factors contributing to the injury. If there were no factors, check *None*.
  - Type or look up an *Activity When Injured* code that best describes the activity of the casualty when injured.
- Complete **General Locations** area fields:
  - Type or look up a *Location At Time of Incident* code that best describes the location of the casualty with relation to the area of fire origin and whether the casualty was involved with the ignition of the fire.
  - Type or look up a *General Location at Time Of Injury* code that best describes the casualty's general location at the time of injury.
- Complete **Specific Locations** area values:
  - If the injury occurred inside a structure, type the *Story at Start of Incident*. If the story is below grade, check *Below Grade*.
  - If the injury occurred in a structure, type the *Story Where Injury Occurred*. If the story is below grade, check *Below Grade*.
  - Type or look up a *Specific Location at Time of Injury* code.
- Type or look up a *Primary Apparent Symptom* that best describes the casualty's most apparent serious injury.
- Type or look up a *Primary Area of Body Injured* code that best describes the part of the body that was most seriously injured. It should be the same part of the body affected by the primary apparent symptom.
- Type or look up a *Disposition* code if the casualty was transported to an emergency care facility by the fire department or other emergency medical service provider.
- Complete remaining sections as needed, then save and close.

To Add Fire Service Casualty Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click *Additional Reports* tab.
- Press **Fire Service Casualty**. If a listing of fire service casualty reports is displayed press **Add**. The **Fire Service Casualty Report** form is displayed.

- Type or look up the *Staff ID* for the staff member injured. Remaining fields complete are completed when available.
- Type the *Injury Time* using military time.
- Type the *Number of prior responses during the preceding 24 hours* prior to the time of injury. Do not count the incident at which the injury occurred.
- Type or look up the *Usual Assignment* code.
- Type or look up a *Physical Condition Just Prior To Injury* code to indicate physical condition just prior to the injury. Required. Blank means 'other' or 'undetermined'.
- Type or look up a *Severity* code to indicate the severity of the injury.
- Type or look up a *Taken To* code that best describes where the fire service casualty was taken regardless of who transported the firefighter or whether the firefighter was transported.
- Type or look up the *Activity At Time of Injury* code.
- Click the *Injury* tab.
- Type or look up the *Primary Apparent Symptom* code of the casualty's most serious apparent injury.
- Type or look up the *Primary Area of Body Injured* code for the part of the body that was most seriously injured. It should be the part of the body affected by the *Primary Apparent Symptom*.
- Type or look up the *Cause of Firefighter Injury* code for the immediate cause or condition responsible for the injury.
- Type or look up the *Factor Contributing to Injury* code of the most significant factor contributing to the injury.
- Type or look up the *Object Involved in Injury* code. Check *None* if no object was involved.
- Type or look up the *Where Injury Occurred* code.
- Type or look up the *Relationship to Structure* code indicating whether the injury occurred inside or outside a structure. If inside, complete the *Story Where Injury Occurred* for the story the injury occurred on. If the story is below grade, check *Below Grade*.
- Type or look up a *Specific Location* code that best describes the specific location at time of injury.
- Type or look up a *Vehicle Type* code that best describes the vehicle type the firefighter was in at the time of injury.
- Type or look up *Protective Equipment Contributed to Injury?* code indicating if protective equipment contributed to the injury. If 'Yes' is indicated, click the *Equipt Failure* tab and complete the *Equipt Failure* section:
  - Press **Add** to add equipment involved in injury. The **Fire Service Casualty Equipment Failure** form is displayed.
  - Type or look up the *Protective Equipment Item* code for the type of protective equipment involved.
  - Type or look up the *Protective Equipment Problem* code that best describes the protective equipment problem.

- Type or look up the *Manufacturer* that made the piece of equipment.
- Type or look up the manufacturer's *Model* name. If one does not exist, use the common physical description that is used to describe the equipment.
- Enter the manufacturer's *Serial Number* that is generally stamped on an identification plate on the equipment.
- Complete a detail record for each item that was a factor in the injury. Press **New** to add an additional record. Save and close when finished.

- Complete remaining sections as needed, then save and close.

About EMS/Search & Rescue Reports

You can add EMS incidents from a NFIRS Incident Report. When information shared between NFIRS and EMS is available it is automatically inserted into the EMS record, so we recommend completing the NFIRS incident before creating an EMS incident.

To Add EMS/Search & Rescue Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click *Additional Reports* tab.
- Press **EMS/Search & Rescue**.

We have added to the optional NFIRS 5.0 elements and created a module that can be used as an independent EMS reporting package or to track the optional NFIRS EMS data.

For more details on adding EMS incident reports is included starting page 197.

About HazMat Reports

A Hazmat Report is required for certain incident types.

To Add HazMat Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.

- If the **Query** form is displayed, highlight an incident then press **OK**.

- Click *Additional Reports* tab.
- Press **HazMat**. The **HazMat Report** form is displayed.
- Press **Add**. The Hazardous Materials Release Detail form is displayed.

  Note that a list of chemicals with associated UN and CAS Number (when available), are available by pressing **Chem Lookup**. This list includes chemicals included in NFIRS, a link to the CAMEO database (if available and set up from the **Workstation Options** form, *File Locations* section), other HazMat Reports, and Occupancy Chemical Inventories.

  - Type the 4-digit *UN Number* assigned to the hazardous material. Leave the entry blank if a UN number has not been assigned.
  - Type or look up the *DOT Haz* code that corresponds with the hazard classification and division code as found on a placard or label, in the NAERG, or from the list.
  - Type the *CAS Reg Number* assigned by the CAS to the chemical including dashes. This number may be found in reference materials, on Material Safety Data Sheets (MSDS), and on some product labels. Leave the entry blank if a CAS registration number has not been assigned.
  - Type or look up the chemical or trade name of the hazardous material as shown on the MSDS in Chemical Name, product label, packaging, or container.
  - Type or look up the container *Type* code.
  - Type the estimated amount of material that the container was designed to hold in *Capacity*, by volume or weight, to the nearest whole unit of measure.
  - Type or look up the *Capacity Unit* code for the appropriate unit of measure.
  - Type the estimated *Release Amount* of material released from the container, by volume or weight, to the nearest whole unit of measure.
  - Type or look up the *Release Unit* code.
  - Type or look up the *Physical State Released* code.
  - Type or look up the *Released Into* code that best describes the environment contaminated by the hazardous material.
  - Press **Save** and **New** to add an additional material release record. Add as many as necessary, then save and close.
- Click the *Scene* tab.
- Type or look up *Released From* code. If ‘Inside or On Structure’, enter the *Story of Release*. Check *Below Grade* if the location of the release was below grade.
- Type or look up a *Population Density* code that best describes the area adjacent to the hazardous materials release.

- Type the numeric value for the *Area Affected* area affected, then Type or look up the *Area Unit of Measure* code.
- Type the numeric value for the measurement of the *Area Evacuated*, then Type or look up the *Area Unit of Measure* code. If there was no evacuation, check *No Area Evacuation* and skip to the **HazMat Actions Taken** area.
- If *No Area Evacuation* is not checked, type the estimated number of *People Evacuated* and *Buildings Evacuated*. Include buildings that were already empty in the evacuated area (for example, houses with no one home during the day).
- Complete the **Hazmat Actions Taken** area:
  - Press + and Type or look up the *HazMat Actions Taken* code, or press ++ and select multiple *Hazmat Actions Taken* codes. The first three are included in the export file.
  - Type or look up the *If fire or explosion, which first?* code. Type "1" (Ignition) if a fire led to a release of hazardous materials.
  - Type or look up a *Cause of Release* code.
  - Type or look up a *Factors Contributing to Release* code for up to three significant factors and descriptors that contributed to the release or threatened release of the hazardous material, or check *None*.
  - Type or look up *Factors Affecting Mitigation* codes for significant factors that impeded or affected the mitigation of the release or threatened release of the hazardous material, or check *None*.
  - Click the *Equipt, Mobile Prop & Disposition* tab.
  - In the *Equipment Involved in Release* areas, If no equipment was involved, check *None*. Otherwise, complete the *Equipment Involved*, *Brand*, *Model*, *Serial Number*, and *Year* fields.
  - In the *Mobile Property Involved in Release* area, If no mobile property was involved in release, check *None*. Otherwise, complete the appropriate fields in the area.
  - Identify and record the number of civilian *Deaths* as a result of this HazMat incident.
  - Identify and record the number of civilian Injuries.
  - Check *No Casualties* if there were no casualties.
- Type or look up the *Disposition* code that best describes the final disposition of the incident.
- Press **Save** and **Close**.

About Wildland Fire Reports

The Wildland Fire Report is an optional alternative form that may be used for any of the following Incident Types:

- 140 Vegetation fire, other
- 141 Forrest, woods or wildland fire

- 142 Brush or brush and grass mixture fire
- 143 Grass fire
- 160 Special outside fire, other
- 170 Cultivated vegetation, crop fire, other
- 171 Cultivated grain, crop fire
- 172 Cultivated orchard or vineyard fire
- 173 Cultivated trees or nursery stock fire
- 561 Unauthorized burning
- 631 Controlled burning (authorized)
- 632 Prescribed burning (authorized)

To Add Wildland Fire Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Additional Reports* tab.
- Press **Wildland Fire**. The **Wildland Fire Report** form *Scene* section is displayed. If you complete the Wildland Fire Report, do not complete the regular Fire Report (NFIRS-2).
- Specify latitude/longitude or section/township/range/meridian. Use one of these if you checked *Wildland Address* on the *Basic* section of the main incident form. If you put an address on the *Basic* section, entry in this section is optional.
- Type or look up the *Area Type* code to indicate the type of area at the origin of the fire.
- Type or look up the *Wildland Fire Cause* code that best describes the cause of the wildland fire.
- Type or look up *Human Factors Contributing To Ignition* codes in this section as are applicable. If there were no human factors, check *None*.
- Type or look up *Factors Contributing To Ignition* codes for factors that contributed to ignition.
- Click the *Fire* tab.
- Type or look up the *Fire Suppression Factors* codes that best identify the conditions or factors that constituted a significant suppression problem at the incident. The first three are exported.
- Type or look up *Heat Source* codes for the heat source that ignited the item first ignited.
- Type or look up a *Mobile Property Type* code that best describes the type of mobile property involved.
- Type or look up a *Equipment Involved* code for the equipment involved in the ignition.

- If the *National Fire Danger Rating System Weather Station ID* is provided, *Weather Type*, *Wind Direction*, *Wind Speed*, *Air Temperature*, and *Relative Humidity*, *Fuel Moisture* and *Fire Danger Rating* fields are optional.
- Press **Weather** to display **Weather Information** form.
  - Type or look up the *Weather Type* code indicating weather at the start of the incident.
  - Type or look up the *Wind Direction* code for the direction that the eye level wind is coming from.
  - Type the *Wind Speed* in miles per hour. The direction and speed are those at eye-level, not at higher altitude. Enter the average wind speed to the nearest mile-per-hour at the origin of the fire. Calm conditions are recorded as "0."
  - Enter the *Temperature* in degrees Fahrenheit.
  - Check *Below 0* if the temperature is below "0".
  - Enter the *Relative Humidity* (the measure of atmospheric water content expressed as a percentage:
0% (dry), 100% (rain).
  - Enter the *Fuel Moisture* percentage level. Fuel moisture is the ten-hour reading of the moisture content of a fuel stick taken in the general area of fire origin. Fuel moisture is expressed as a percentage of the weight (generally ranging from 0 to 25 percent).
  - Type or look up the *Fire Danger Rating* code that best describes the fire danger at the time and place of the fire, based on the National Fire Danger Rating System.
  - Save and close the **Weather Information** form.
- Type the *Number of Buildings Ignited* by the wildland fire. If no buildings were ignited, check *None*.
- Type the *Number of Buildings Threatened*, but not ignited by the wildland fire. Check *None* if no buildings were threatened.
- Type the *Total Acres Burned*. If less than one acre was burned, the decimal point field should be used to denote tenths of an acre.
- Type or look up *Primary Crops Burned* codes for crops that burned in the fire. Enter the crop with the most burned acres first. If no crops were burned, leave blank.
- Click the *Responsibility* tab.
- Check appropriate *Percentage of Total Acres Burned* types and complete percentages for each.
- Type or look up the *Property Management* code for the property type that best describes the principle entity that has responsibility for the property where the fire originated. Type "U" if undetermined.
- Enter the *NFDRS Fuel Model At Origin* code that best identifies the type of wildland vegetation burned at the point of origin.

- Type or look up the *Person Responsible for Fire* code that best describes the involvement of person in causing the fire. If the person responsible for causing the fire is known, identifying information about the person can be entered by pressing **Detail**.
  - Type or look up the gender (sex) code of the person involved in *Gender*.
  - Enter the age in years in *Age*, or type the *Date of birth* and calculate age.
  - Type or look up the code that best describes the activity of the person involved that caused the fire in *Primary Activity of Person(s)*.
  - Press **OK** to save details.
- If the origin of the fire was less than 100 feet of any right of way, enter the number of feet from the right of way to the origin of the fire in Distance. Rights of way include railroad rights of way, highways, roads, parking lots, etc.
- Type or look up the *Type of Right of Way* code.
- Enter the distance above mean sea level measured in feet in *Elevation*.
- Type or look up the *Relative Position on Slope* code.
- Type or look up the *Aspect* code for slope faces.
- Enter the average height (in feet) of flame at head of fire in *Flame Length*.
- Enter the *Rate of Spread* of the head of the fire in chains (66 feet/chain) per hour.
- Save and close the **Wildland Fire Report** form.

About Staff Activities

Incident response staff activities are added from the **NFIRS Incident Report** form *Units & Personnel* section. You can review the list of staff activities added for the incident from the **NFIRS Incident Report** form *Additional Reports* section, or add staff activities related to the incident (but not incident response related) from the *Additional Reports* section.

To Add Incident-Related Staff Activity (Not Response Related)

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Additional Reports* tab.

- Press **All Staff Activities**. If no staff activities have been added for the incident, the **Staff Activity** form is displayed.
  If a staff activity has been added (a staff activity is automatically added if personnel are added from the *Units & Personnel* section) incident staff activities are listed, and you can edit existing staff activities or add separate staff activities. Multiple staff activities for a single incident are useful for separating distinct activities that occur on different dates and times, like emergency response, and follow-up investigation of the incident.

  The default staff activity information is defined in the main **Staff Activity** form, then participants are added and the default information defined is applied to the individual staff member's activity records. You can modify default information after participants are added, and staff members that have been added after the changes will have the new information applied. Individual staff member activity records can be modified one at a time, or changes can be applied to all activity participants in one step.

  NOTICE
  Multiple Activities For One Individual

  A single participant can be added to a staff activity more than one time as long as a different Staff Activity Codes is used. This allows you to track different types of activities for a single staff member.

  - Type or look up the *Default Activity Code* codes for the activity. *Activity Description* is automatically filled in with the description associated with the activity code. The values you select will be added to each participant's activity record. You can modify individual member detail records, or change this value after adding participants.
  - Type or look up the *Station*, *Shift*, and *Unit* codes for staff member's to be added to the activity. If most staff share a particular station, shift, or unit, use these fields. These fields can be left empty.
  - The values you add to the *Hours Worked* fields in this section are added to each staff member record added.
  - The values you add to the *Credits Points* fields in this section are added to each staff member record added.
  - The values you add to the *Hours Paid* fields in this section are added to each staff member record added.
  - Type or look up a *Pay Scale* code to apply to each staff member added to the activity. When a pay scale code is included, the dollar amount associated with the pay scale code will be credited to the staff member and hours paid times the staff member's default hourly rate will be ignored. Additional pay options are available:
    - Check *Credit Both* to calculate pay by multiplying hours paid by the staff member's default hourly rate, plus the amount associated with the pay scale code.

- Check *Scale = Hr Rate* to use the amount associated with the pay scale code and multiply it by hours paid (staff member's default hourly rate is ignored).

- Press **Add** to add a single staff member to the activity. The **Participant Detail** form is displayed.
- Press **Add Group** to add multiple staff member's to the activity. The **Staff Group Select** form is displayed. Select staff members then press **OK** to add selected staff members to the activity record. The **Staff Activity - Group Add** form is displayed.

More information on adding groups is listed on page 88.

- Press **Open** to change a selected staff member record. The **Participant Detail** form is displayed.
- Press **Edit Group** to apply changes to all staff member records added for the staff activity. The **Staff Activity - Group Update** form is displayed.

See the FH Help File "Staff Activity" topic for more information on related forms.

- Notes, and miscellaneous items like attached files and record modification history for the staff activity can be accessed.
- Save and close the **Staff Activity** form. Add additional activities if needed.
- Press **Close** when finished.

About Incident Equipment Usage

Equipment usage records detail how your equipment records are used. Accurate usage records include equipment hours or miles, and will be part of your maintenance tracking routine if you have set up scheduled maintenance items.

To Add Equipment Used

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Additional Reports* tab.
- Press **Equipment Used**. The **Equipment Used** form is displayed.
- Press **Add** to add an equipment used record, or **Add Group** to add multiple equipment usage records. The **Usage/Purchasing Detail** form is displayed.
- Complete equipment usage details. When multiple equipment is added, equipment usage details are applied to all equipment usage records.
- Add quantity and cost information, if applicable.

See "Tracking Quantity and Cost" on page 105 for more information.

- Click the *Notes* tab and add equipment usage notes if applicable.
- Save and close the **Usage/Purchasing Detail** form.
- Press **Close**.

About Dollar & Loss Value Reports

Estimated dollar loss is required for all fires where the value is known.

To Add Dollar Loss & Value Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Additional Reports* tab.
- Press **Dollar Loss & Value** to display the **Loss & Value Report**. If you are prompted, select *Buildings* or *Vehicles* and press **OK**. The **Loss & Value Report** form is displayed.

Values entered in the *Response* section are displayed, and you can add additional insured amount and settlement amounts, as well as vehicle value information and insurance company information.

About Arson/Investigation Reports

The optional Investigation Report may be used whenever the *Cause of Ignition* is “intentional,” or “under investigation” without any distinction made as to whether or not a crime has occurred, or a determination of criminal intent. The Investigation Report may also be used when the fire is under investigation or in cases where the cause is “Undetermined after investigation.”

To Add Arson/Investigation Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Additional Reports* tab.

- Press **Arson/Investigation**. The **Arson/Investigation Report** form is displayed.

See the Investigation Reports starting on page 176 for more information.

About Vehicle Accident/Extrications

Add vehicle and extrication information when applicable.

To Add Vehicle/Extrication Report

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Additional Reports* tab.
- Press **Vehicle Accident/Extrication**. The **Vehicle Accident/Extrication** form is displayed.
- Complete applicable information.
- Press **Copy Vehicle Info** to review a list of vehicles added to other incidents. Select a vehicle and press **OK** to add vehicle information to the extrication report.
- Press **Save**, then **Close**.
- To add additional vehicle accident/extrication reports, press **Add**, or press **Close** if finished.
- Save and close incident.

About NFPA 1710/1720 Information

NFPA 1710 (for career firefighters and EMS personnel) and NFPA 1720 (for volunteers) define minimum response times to an emergency and minimum fire company and EMS staffing levels. The **NFPA 1710/1720 Information** form provides a method for tracking compliance with the standard.

To Add NFPA 1710/1720 Information

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.

- Click the *Additional Reports* tab.
- Press **NFPA 1710/1720 Information**. The **NFPA 1710/1720 Information** form is displayed.
- Add information as needed. The *Alarm Date* is associated with each completed time field. Press the lookup button for the completed time field to specify a date other than the *Alarm Date*.
- Press **Same as Response** and select the unit to add the date and time for a responding unit added to the *Units & Personnel* section.
- Save and close.

About Narratives

Narratives can be typed or automatically generated.

To Add Incident Report Narrative

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Incident Narrative* tab.
- Add notes:
  - If auto-narrative is enabled:
    - Press **Auto-Generate**.
    - Select the narrative generation template.
    - Press **Generate**. The narrative is generated in the **Narrative Generation** form.
    - Review and make any necessary changes.
    - Press **OK** to insert the text at the end of the narrative.
  - If append-only is enabled:
    - Press **Append**. The **Append to Narrative** form is displayed.
    - Type the notes then press **OK**.
- Press **`F7`** to spell check your entry.
- Save and close incident.

To Enable NFIRS Auto-Generated Narratives

- Select the **Administration** menu **Administrative Options** option. The Administrative Options form is displayed.
- Click the *Incident* tab *NFIRS* section .
- Check *Provide the option to auto-generate the NFIRS incident narrative*.

- Press **OK**.

About Special Studies

The agency collecting your NFIRS data has the option to require temporary data elements that can be used for collection of information that is of special interest for a defined period. Special studies are typically required to capture information on emerging trends, problem areas, or a specific issue being studied. When the answer becomes known through the special study, the collection of that field is no longer required. If you are participating in a special study, entries depend on the type of data being collected. Use the codeset defined for the particular *Special Study* field if it is a coded entry. The data entered may also be a date or a numeric entry if the field has been so defined.

To Add Special Studies

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Other* tab.
- Press **Special Studies**.
- Type or look up *Special Study* codes as defined in the state or local jurisdiction.
- Press **Save**.
- Save and close incident.

Completing User Fields

User-defined fields include any fields added by your department.

To Add User Field Values

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Other* tab.
- Press **User Fields**.

User-defined fields are detailed in the Advanced Feature Reference.

About Record Locking and Modification

You can manually lock the incident from modification by non-administrative users and view modification history. Manual locking is different than automatic incident locking, which is specified in the **Administrative Options** form *Incident* section. Both manual and automatic locking limits the ability of non-administrative users from modifying the incident unless the user has the right to override record locks.

To Manually Lock Record

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Other* tab.
- Press **Record Lock Status**.
- Check *Lock Record*. When the record is locked, the incident can only be modified by an administrator or the user who locked the report. Related staff activities are not locked.

To View Manual Record Lock Status

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Other* tab.
- Press **Record Lock Status**. If the record is locked, the incident can only be modified by an administrator or the user who locked the report. Locking functionality is specified in the **Administrative Options** form *Incident* section.

To View Record Modification History

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.

  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Other* tab.
- Press **Record Modification History**. The **Record Modification History** form is displayed. The amount of information displayed depends on the level of tracking selected from the **Administrative Options** form *Database* section.
- Press Close when finished.

About State Import/Export History

View a history of imported (for state and regional data collection centers) and exported incidents.

To View State Import/Export History

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Other* tab.
- Press **State Import/Export History**.
- Press **OK** when finished.

About Report Authorizations

Report authorizations are most often used to indicate member making report or quality control.

To Add Report Authorizations

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, highlight an incident then press **OK**.
- Click the *Other* tab.
- Press **Add** in the **Report Authorizations** area. The **Report Authorization** form is displayed.
  - Type or look up the *Authorization Type* code for the authorization type.

  - Type or look up the *Staff ID* code for the staff member.
  - The *Assignment* of the authorization member (typically the unit code on which the staff member rode). Defaults the value of the assignment field to the staff member's unit or from the staff member's activity record when *Default the assignment* is enabled from the **Administrative Options** form *Incident* section.

NOTICE Tip

When you are adding an OC type authorization check *Add or update Member Making Report authorization with this same information* to create an MM type authorization record with the same information.

- Press **Save** and **New** to add an additional report authorizations, or press **Save** then **Close**.
- Save and close incident.

Completing Responding Units and Personnel Without Editing Main Incident

There are certain situations where the base incident has been created and unit and personnel response information is the only remaining information required to finish the incident. If an incident record has already been added in FH, units and personnel response are the only information needed to complete the incident and access to the main incident is restricted or unnecessary, you can use the **Unit & Personnel Response Entry** area. The Units and Personnel Response area was specifically designed for clients that use CAD systems to create a basic incident.

NOTICE
Remote Response

Note that the Units and Personnel Response area is different than the Remote Response area. The Units and Personnel Response area can only be used when the incident is added to the current FH database, Remote Response is for stations that add response information from a remote location, then export the response information to a central FH installation using the import/export feature.

Adding Unit & Personnel Response Entry outside an Incident Report

This area allows the **Unit & Personnel Response** area of an incident report to be accessed independent of the incident. An incident must exist, but does not need to be complete.

To Add Unit and Response Entry to Existing Incident

- From the **File** menu select the **Unit & Personnel Response Entry** option. The **Unit and Personnel Response** form is displayed.
- Press ... to the right of the *Incident Number* field and select an incident.
- Add units and personnel.

Additional information on adding responding units and personnel is available in 'To Add Responding Units' on page 140.

Chapter 11

Investigation Reporting

Investigation reports may or may not be linked to a specific incident. Investigation reports can include information about people performing investigation activities, referrals, evidence collected, photos, leads, and other information required to detail investigation efforts.

Adding Investigation Reports

Investigations can be added from a fire incident (**NFIRS Incident Report** form *Additional Reports* section, **Arson/Investigation** button) or entered directly. When added from an existing NFIRS incident, information from the incident is included.

Adding Basic Investigation Records

Basic investigation information includes information to identify the investigation and start date, status, and status date.

To Add Basic Investigation Information

- From the **File** menu select the **Incident Investigations** option.
  - If the **Investigation** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
  - If a blank **Investigation** form is opened, you are ready to enter a new record.
  - If the **Query** form is displayed, press **Cancel** to add a new record.
- Type a basic description of the investigation.
- Type an *Investigation ID* or press **`Tab`** to have FH automatically assign one (if automatic ID generation is enabled via **Administrative Options** form *Database* section *Key Values* section).
- Complete remaining fields as needed. Note that the investigator listed at the top of the list is considered to be the primary investigator.
- Save and close investigation.

Associating Investigations with Incidents

When an investigation is added from an incident, the investigation record is automatically associated with the incident. You can associate an investigation that was not added from an incident with a specific incident if necessary.

To Associate Investigation with Incident

- From the **File** menu, select the **Incident Investigations** option.

- If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
- If the **Query** form is displayed, select the record to modify and press **OK**.

- Press ... to the right of the *FDID/Alarm Date/Incident Number* fields.
- Select the incident to associate with the investigation and press **OK**.
- Press **OK** to prompt.
- Save and close.

Linking Investigations

Investigation records can be linked together. This allows separate investigations of a single incident to be tied together.

To Link Investigation

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Press **Linked Investigations**.
- Press **Add** and select investigations to link together, then press **OK**.
- Save and close.

About Referrals

Referrals are agencies, if any, that an investigation is referred to for follow-up investigation. This might be a law enforcement agency that has jurisdiction for a criminal investigation or another fire department that will conduct the investigation.

To Add Referrals

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the **Referrals** tab.
- Press **Add**. The **Investigating Agency** form is displayed.

- Type or look up the *Department/Agency Code*, and optionally, the *Case Number* assigned by the department/agency and *Referral Date*.
- Save and close referral. Address and contact information associated with the agency lookup code is listed in the **Investigation** form *Referrals* section.
- Save and close.

About Evidence Records

Evidence records include details about each piece of evidence collected during the investigation, details about tests performed on the evidence, tracking the chain of evidence custody, and notes.

To Add Basic Evidence Record

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Evidence* tab.
- Press **Add**. The **Evidence Collected Detail** form is displayed.
- Add basic information.
- Save and close to return to the **Investigation** form.
- Save and close.

To Add Evidence Test Records

With the **Evidence Collected Detail** form displayed:

- Click the *Tests* tab.
- Press **Add**. The **Evidence Test Detail** form is displayed.
- Add test information.
- Save and close test detail record.
- Save and close evidence collected detail record.
- Save and close investigation record.

To Add Chain of Custody Records

With the **Evidence Collected Detail** form displayed:

- Click the *Evidence* tab.
- Highlight evidence record and press **Open**. The **Evidence Collected Detail** form is displayed.
- Click the *Chain of Custody* tab.
- Press **Add**. The **Chain of Custody Detail** form is displayed.

- Add basic information.
- Save and close chain of custody detail record.
- Save and close evidence detail record.
- Save and close investigation record.

Adding Photos

Pictures from the investigation can be added to an investigation report and viewed in FH if they are in a compatible format (BMP, PNG, WMF, EMF, JPG, GIF, and TIF are valid options). Additional formats can be added and viewed using the application associated with the file type.

To Add Investigation Photo

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Photos* tab.
- Press **Add**. The **Photograph Detail** form is displayed.
- Add desired information about photograph.
- Click the *Photograph* tab.
- Select *Individual Photo*.
- Press **File**. The **Select File** dialog is displayed.
- Locate and highlight photograph file and press **Open**.
- Check *Store File in Database* to keep photograph in database to allow users to display image at workstations that do not have access to the file where the photo image file is located.
- Save and close photograph detail.
- Save and close investigation record.

To Add Investigation Directory of Photos

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Photos* tab.
- Press **Add**. The **Photograph Detail** form is displayed.
- Add desired information about photograph directory.
- Click the *Photograph* tab.
- Select *Directory of Photos*.

- Press **Directory**. The **Select File** dialog is displayed.
- Locate and highlight photograph directory, then press **OK**.
- Type a description for the directory of photos.
- Save and close photograph detail.
- Save and close investigation record.

To Preview Individual Photo

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Photos* tab.
- Highlight photo record.
- Check *Preview*. If the attached photo is in BMP, PNG, WMF, EMF, JPG, GIF, or TIF format a thumbnail is displayed.
- If a thumbnail of the photo is not displayed, press  to open the photo using the application associated with the file type or to open the directory of photos.
- Save and close investigation record.

Adding Fire/Arson Information

There is specific information that needs to be tracked if the investigation is a result of a suspicious fire.

To Add Fire/Arson Information

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Fire/Arson* tab.
- Add fire/arson details.
- Save and close.

Adding Leads/Involvements

The investigation should include a record for each involvement or suspect.

To Add a Lead or Involvement

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Leads/Involvements* tab.
- Press **Add**. The **Leads/Involvements** form is displayed.
- Type the suspect or involvements *Last Name*.
- Enter the *Date of Birth* or *Age* of the subject. Make an approximation if the age cannot be determined. If the age is less than 18, *Juvenile Disposition* is required.
- Press **Add from Occupancy** if the investigation was at an occupancy record and the contact is an investigative lead.
- Press **Add from Involvement** if the investigation is linked to an incident record with involvement records. A lead/involvement record should be added for each lead/involvement. Press **Save** and **New** to add an additional record. Save and close lead/involvement when finished.
- Save and close the investigation record.

About Scene Information

When linked to an incident, the scene information is added from the incident record and can not be modified. You should add scene information if the investigation is not linked to an incident.

To Add Scene Information

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click *Scene* tab.
- Add scene information.
- Save and close.

About Investigation Activities

Investigation activities conducted by staff should be tracked and can be added from the investigation record.

To Add Investigation Activity

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click *Activities* tab.
- Press **Add**.
- Add staff activity details, then save and close.
- Save and close investigation record.

About Investigation Narratives

An investigation narrative can include a description of the investigation.

To Add a Narrative

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Narrative* tab.
- Type a narrative.
- Save and close.

Completing User Fields and Attaching Files

You can complete user fields if they have been defined for investigation records, and attach files. Note that photos are attached from the Photos section, but you can attach images or other files in a non-FH format if necessary.

To Complete Investigation User Field(s)

- From the **File** menu, select the **Incident Investigations** option.

- If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
- If the **Query** form is displayed, select the record to modify and press **OK**.

- Click the *Other* tab.
- Press *User Fields*.
- Add information.
- Save and close.

To Attach File to Investigation

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Other* tab.
- Press **Attachments**.
- Press **Add**.

Press **`F1`** for more information on attaching files.

- Save and close.

About Investigation Locking and Modification History

Investigations can be locked from modification by non-administrative users who do not have override record lock rights. A complete history of modifications can be viewed for the record.

To View Record Lock Status

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.
  - If the **Query** form is displayed, select the record to modify and press **OK**.
- Click the *Other* tab.
- Press **Record Lock Status**.

Press **`F1`** for more information.

- Save and close.

To View Record Modification History

- From the **File** menu, select the **Incident Investigations** option.
  - If the **Investigation** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record to modify, then press **OK**.

- If the **Query** form is displayed, select the record to modify and press **OK**.

- Click the *Other* tab.
- Press **Record Modification History**.

Press **F1** for more information.

- Save and close.

Chapter 12

EMS/Search & Rescue Incident Reporting

NFIRS 5.0 includes an optional EMS section that gathers EMS related data. The FH EMS module incorporates the basic NFIRS 5.0 EMS elements and adds additional capabilities including the ability to use the entire NHTSA code set.

If the EMS module is not configured for your FH system, EMS Incident Reports can only be accessed from a NFIRS Fire Incident Report, and all data elements and features not specifically required by the NFIRS 5 EMS Incident Report specification are inaccessible.

Validation and available lookup codes vary based on the EMS code set selected from the **Administrative Options** form *Incident* section **EMS/Search & Rescue** subsection (accessed from the **Administration** menu, select the **Administrative Options** item, *Incident* section, then select the *EMS/Search & Rescue* subsection, *Code Set* section, then press *Active EMS Code Set*).

Carefully consider what code set works best for you. Changing code sets after EMS reports are entered will result in incomplete EMS reports.

About EMS Incidents

When a new EMS incident is displayed in the **EMS/Search & Rescue Incident Report** form, the included values and required fields vary depending on whether the EMS incident was initiated from a NFIRS incident report, on the installed EMS code set, and on the system rules and default values set up for your system. As you complete the EMS incident, additional information may be required based on the value you enter.

Adding Basic EMS Incident

EMS incidents are often started from a fire incident (**Incident** form *Additional Reports* section, **EMS/Search Rescue** button). When an EMS report is initiated from the Incident form, relevant information from the fire incident report is transferred to the EMS incident.

To Add Basic EMS Incident Data

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
    - If the **EMS/Search & Rescue Report** form is displayed, press **New** (or **`Ctrl + N`**).
    - If the **Query** form is displayed, press **Cancel**.
- Values automatically entered in *EMS Service #* and *FDID* are associated with the central station indicated on the **Workstation Options** form, *General* section *Startup & Navigation* section *Workstation Location* field. Change if necessary.
- Type the *Alarm Date*. This date is when the alarm was received by the fire department and must be the same as the date for the alarm time. The *Alarm Date*, in conjunction with *FDID*, *Alarm Time*, and *Incident Number* fields, uniquely identifies each incident.
- Type the *Alarm Time* that the alarm was received by the fire department. Use military time.
- Type the *Incident Number* or press **`Tab`** to automatically assign a number (auto-numbering must be enabled via the **Administrative Options** form *Incident* section).

NOTICE
Change Key Values

To change *EMS Service#*, *FDID*, *Alarm Date*, or *Incident Number* after the incident is saved, you must renumber the incident via the **Form** menu **Renumber EMS/Search & Rescue Incident Reports** option.

- Type or look up the *Occupancy ID* key value for the occupancy where the incident occurred at. When used, the address information from the occupancy record is inserted into the address fields. Address values brought from the occupancy record cannot be modified on the form if *Allow scene/address data to be changed even if Occupancy ID is used* is not enabled in the **Administrative Options** form, *Incident* section *General* section.
- Check *Mass Casualty* if appropriate (used by certain EMS code sets like NHTSA 2/NEMSIS).
- Check *No Patient Found* if there is not a patient for this EMS record.
- Select *Address Type*, which may be a street address, an intersection of two roadways, or directions from a recognized landmark. Incident address information is required to establish a legal report reference. This information may also be useful for identifying local problems, such as checking for multiple incidents at the same location.
  - If you select "Street Address":
    - Type the *Number* of the specific location where the incident occurred. This number is part of the address information where the incident occurred. For structures and lots, enter the street number. For highways, railroads, etc., enter the mile-post number. For block addresses, enter the block number.
    - Type or look up the *Prefix*, *Street/Highway*, *Type*, *Suffix* values for the incident.
    - Type the *Apt/Room/Suite* number where the incident occurred (any combination of numbers and letters). This number is part of the address information when the incident occurs within an apartment, suite, identifiable room or area generally rented or leased. Leave blank if not applicable.

NOTICE
Intersection Addresses

Use "Intersection" ONLY if the location cannot otherwise be identified.

  - If you select "Intersection":
    - Type or look up the *Prefix*, *Street/Highway*, *Type*, *Suffix* values for the incident.

NOTICE
Rural Addresses

Use "Rural" ONLY if the location cannot otherwise be identified.

  - If you select "Rural/Directions":
    - Type *Directions* to the incident location.
  - If you select "National Grid":
    - Type *National Grid Location*.

- Select an additional descriptor for specifying the incident location for *Vicinity*.
- Type or look up the *City*, *St*, and *ZIP* where the incident occurred. *City* is the first of three fields that are part of a single lookup. If the incident occurred in an unincorporated area, use the city found in the mailing address for the incident location. The state or province may be different from the state or province where the fire department is located. *ZIP* completes the full address of the incident and provides a means of linking fire incident data to other geographic and population factors for comparative analysis at the local and regional levels.
- Type or look up the *Aid Given or Received* code for whether aid was given or received. Required for all incidents.
- Optionally complete supplemental address information:
  - Press **Supplemental Address**.
  - Type or look up the *Latitude* and *Longitude* of the incident address. These values, if available, ensure the most accurate plotting for mapping.
  - Complete remaining fields as needed.
  - Press **OK** to save supplemental address.
- Type or look up a *Dispatched For* description for the emergency provider's impression/assessment. Descriptions previously used for other EMS incidents are also available. When more than one choice is applicable to the patient, choose the single most important clinical assessment that drove the choice of treatment.
- Complete **Times** area fields. The incident record's *Alarm Date* is associated with each completed time field by default, press the time field's lookup button to change the date.
  - Type the time the dispatch was notified by the caller in *Dispatch Notif*, if used.
  - Type the *First Arv Scene* time. Always enter the time of day that the first fire department personnel arrived on-scene. Use military time.
  - Type the *Last Clr Scene* time. Always enter the time of day that the last fire department personnel left the scene. Use military time. If cancelled en route, enter the time of cancellation in this field.
- Type or look up the *Station* identifier of the station. Use to track incident data collected and reported by individual stations.
- Complete remaining fields as needed. You will generally add additional information, including units and personnel.
- Save and close record when finished.

About Units & Personnel

Add responding units and personnel. You can add responding units and personnel as individual records or by using previously defined groups. We recommend adding units and personnel now since they may be used in other areas of the EMS incident. Access to aid given/received details depends on the entry in the *Aid Given or Received* field on the **EMS/Search & Rescue Report** form.

To Complete Aid Given/Received Details

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Press **Aid Given/Received Details** to display a listing of mutual aid given or received. Press **Add** or **Add Group**. The **Aid Given or Received Detail** form is displayed.
- Type or lookup the *Department/Unit Code* for the department or unit that either provided or received mutual aid. Note that additional data elements required for mutual aid given or received departments are added as part of the *Department/Unit Code* lookup setup.
  - Complete **Response Times** area fields. The incident record's *Alarm Date* is associated with each completed time field by default, press the time field's lookup button to change the date.
  - Complete **Resources** area fields. If you give aid, you may choose to report your own resources. Similarly, if you receive aid, you may choose whether to count only your own resources or those of the aid-giving department, as well.
    The aid-receiving department should always report all casualties other than the fire service casualties of the aid-giving department. Each department reports its own fire service casualties.
  - Type *Their Incident Number*. If you gave aid to another fire department enter the incident number assigned to the incident by that department.
  - Save and close mutual aid record. The **Aid Given or Received** list is displayed. Press **Close** to return to the **EMS/Search & Rescue Report** form.
- Save and close EMS record.

To Add Multiple Responding Units

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.

- If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
- If the **Query** form is displayed, you are ready to select an incident then press **OK**.

- Click *Units & Personnel* tab.
- Press **Add Group**.
  - If you use station roster & availability or the optional staff scheduling module, select "All units for <station> (as entered in the station roster or via staff scheduling), or select "Unit code lookup" and select the units to add then press **OK**.
  - If you do not use station roster & availability or the optional staff scheduling module, the **Lookup - Units** form is displayed. Select units to add then press **OK**.
- Press **Unit Incident Actions Taken** to add codes for additional actions taken. Press **OK** to close.
- Complete **Unit Group Add** form *Basic* section values. These values are applied to all responding unit detail records:
  - Type or look up the *Response Code* that best describes the nature of the unit's response.
  - Check appropriate *Fire/Medical/Rescue/Other* types to indicate the main use of this apparatus at the incident. The main use at the incident need not be the consistent with the apparatus type. For example, EMS may be the principal use of the members arriving on-scene in a ladder truck. Required for all incidents.
  - Complete **Response Times**. The incident record's *Alarm Date* is associated with each completed time field by default, press the time field's lookup button to change the date. Check *Cancelled* and type the time the unit was cancelled if relevant.
- Complete **Unit Group Add** form *Personnel* section values:
  - Click the *Personnel* tab.
  - Select the *Personnel for Unit*. Staff is added to the current unit only.
  - Press **Add** or **Add Group** to add personnel.
  - Add personnel for each responding unit.
- Optionally complete **Unit Group Add** form *Usage* section values:
  - Click the *Usage* tab.
  - Select the *Equipment Usage for Unit*. Usage added is applied to the current unit only.
- Optionally complete **Unit Group Add** form *EMS Search & Rescue* section values. These values are applied to all units added.
  - Click the *EMS Search & Rescue* tab.
- Press **OK**. Responding units are added. If *Continue to the Unit Response Detail form* was checked, the **Unit Response Detail** form is displayed and you can add or edit individual unit response details.

To Add a Single Responding Unit

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Press **Add**.
  - If you use station roster & availability or the optional staff scheduling module, select the available unit (as entered in the station roster or via staff scheduling), or if the unit to add is not listed, select "Unit Lookup..." and Type or look up the **Unit Response Detail** form *Unit Code* value.
  - If you do not use station roster & availability or the optional staff scheduling module, the **Unit Response Detail** form is displayed. Type or look up the *Unit Code*.
- Complete **Unit Response Detail** form values.
  - The *Resource Type* code is usually associated with the *Unit*. Required for all incidents.
  - Type or look up the *Response Code* that best describes the nature of the unit's response.
  - Check appropriate *Fire*/*Medical*/*Rescue*/*Other* types to indicate the main use of this apparatus at the incident. The main use at the incident need not be the consistent with the apparatus type. For example, EMS may be the principal use of the members arriving on-scene in a ladder truck. Required for all incidents.
  - Complete **Times**. The incident record's *Alarm Date* is associated with each completed time field by default, press the time field's lookup button to change the date. Check *Cancelled* and type the date and time the unit was canceled if relevant.
  - Press **Response Time Analysis** to review elapsed times between completed date and time fields. Press **OK** to close.
  - Press **Unit Actions Taken** to add codes for additional actions taken. Press **Save** to close.
  - Click the *Personnel* tab.

NOTICE
Add Individual Staff

You can add staff one at a time by pressing **Add** and the **Participant Detail** form is displayed.

  - Press **Add Group**.
    - If you want to select the staff using the staff group select method, select "Staff Group Select...". The **Staff Group Select** form is displayed. Select staff members responding to the incident, then press **OK**.

- If you want to add staff added to the unit from the optional staff scheduling, select "Add From Scheduling...".

NOTICE
Add Additional Staff Activities

In certain circumstances, a unit will respond that has no staff assigned to it in FH Staff Scheduling (the staff are assigned to another unit and respond on the other unit in certain circumstances). For example, if all staff are assigned to unit 'A' but unit 'B' responds in limited circumstances, and unit 'B' responds, adding the unit via "Add from Scheduling..." will result in no personnel. In this instance, the person entering the incident can add the unit from scheduling, then from the Personnel section add personnel using the "Add from Roster" method and selecting unit "A" personnel that responded on unit "B".

- If you want to add staff added to the unit from the station roster, select "Add From Roster...".
- The **Staff Activity - Group Add** form is displayed.
- Add or modify group participant details, then press **OK** to add selected staff with participation details to the unit response record.

NOTICE
Add Individual Staff

Individual staff member can be modified. For example, you can add a staff member in this manner, and modify the individual participation detail record to exclude response on a particular unit. All participant detail records are automatically added to a staff activity record.

- Optionally add equipment usage. Click the *Usage* tab, then press **Add Linked** to add a usage record for the responding unit, or press **Add Other** to add a usage/purchasing detail record for a different piece of equipment.
- Optionally add unit narrative. Click the *Unit Narrative* tab then type narrative.
- Optionally add EMS/Search & Rescue response information. This information is added to EMS/Search & Rescue incident patient records for the unit if an EMS incident is created from this NFIRS incident. Click the *EMS/Search & Rescue* tab and patient information.
- Optionally complete user fields, attachments and signatures, and other actions for the unit response. Click the *Other* tab and complete as needed.
- Press **Save**.

  All units added for the incident are listed in the lower right area of the *Basic* section, and if necessary an additional unit can be added by pressing **+** and a listed unit can be removed by highlighting the unit and pressing **-**.

To Edit a Single Responding Unit

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Reporting** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the default query for selecting NFIRS Incident Reports is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Highlight the responding unit to edit.
- Press **Open**. The **Unit Response Detail** form is displayed.
- Change values as needed.
- Save and close.

To Edit All Responding Units

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click *Units & Personnel* tab.
- Press **Open All**. The **Unit Response Detail** form is displayed. All units added for the incident are listed in the lower right area of the *Basic* section, and if necessary an additional unit can be added by pressing + and a listed unit can be removed by highlighting the unit and pressing **-**. Use the record navigation buttons at the bottom of the form to navigate to the next record.
- Change values as needed.
- Press **Apply to All**, check the fields with values that should be applied to all units, then press **OK**.
- Save and close.

To Add Staff Activities

NOTICE
Modify Individual Staff

Staff added from responding units are listed here. You can add additional staff if necessary. To add activities for incident-related activities that are not specifically incident response activities should be added from the **NFIRS Incident Report** form *Additional Reports* section **Staff Activities** button. Incident-related activities that are nor incident response related are not displayed in the *Units & Personnel* section.

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.

- If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
- If the **Query** form is displayed, you are ready to select an incident then press **OK**.

- Click *Units & Personnel* tab.
- Press **Add** to add a single staff member to the activity. The **Participant Detail** form is displayed.

You can also add multiple staff at one time using the **Add Group** button. More information on adding groups is listed on page 88.

NOTICE
Add Individual Staff

A single participant can be added to a staff activity more than one time as long as a different *Activity Code* is used. This allows you to track different types of activities for a single staff member.

- Type or look up the *Staff ID*.
- Type or look up the *Activity Code* for the activity. The description is automatically filled in with the description associated with the activity code.
- Type or look up the *Station*, *Shift*, and *Unit* codes for staff member's to be added to the activity. If most staff share a particular station, shift, or unit, use these fields. These fields can be left empty.
- The values you add to the *Hours Worked* fields are added to each staff member record added.
- The values you add to the *Credits Points* fields in this section are added to each staff member record added.
- Complete **Payroll Calculation** information.
  - The *Hours Paid* values you add to the fields in this section are added to each staff member record added.
  - Type or look up a *Pay Scale* code to apply to each staff member added to the activity. When a pay scale code is included, the dollar amount associated with the pay scale code will be credited to the staff member and hours paid times the staff member's default hourly rate will be ignored. Additional pay options are available:
    - Check *Credit Both Hours Paid and Pay Scale* to calculate pay by multiplying hours paid by the staff member's default hourly rate, plus the amount associated with the pay scale code.
    - Check *Use Pay Scale as the Hourly Rate* to use the amount associated with the pay scale code and multiply it by hours paid (staff member's default hourly rate is ignored).
- Add additional information as needed. Save and close when finished.

Adding Patient Records

Access to patient information is controlled via security. Access to patient records can be limited to personnel that entered the patient records if needed.

NOTICE
Required Fields

Required fields vary widely in EMS patient records based on the selected EMS code set.

To Add Basic Patient Information

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Press **Add**. The **Patient/Victim Information** form is displayed.
- Type the **Last Name** of the patient/victim and additional patient name information if available.
- Type or look up the *Unit* code for the unit responding for this patient/victim.
- A unique *Patient Number* is assigned. The first patient for each incident is 001; the second 002, etc.
- If patient/victims are assigned account numbers, type the *Patient Account #*. Previously entered account numbers are available for lookup.
- If you bill, press **Billing/Guardian Information**.
  - Check *Billing Same as Patient* to use patient name and address information. Otherwise, complete billing or guardian information.
  - Add additional information as needed, then save and close.
- Complete **Residence Address** area fields. Click *Same as Scene Address* to use address information from the EMS incident.
- Type or look up *Date of Birth* of the patient, or the *Age-yrs* and *mos* (months). If the age cannot be determined, make an approximation. For patients less than a year old, enter the number of months.
- If insurance details are available, check *Yes* in the **Insurance?** area and press **Details**. The **Insurance Information** form is displayed.
  - Complete known insurance information.
  - Save and close form.
- Add phone numbers if available.
  - Press + to add phone type code, phone number, and extension. Repeat for each phone number you wish to add.
- Complete additional information as needed.

- Save and close EMS patient record.

To Add Patient Response Details

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Response* tab.
- Complete **Times** area fields. The incident record's *Alarm Date* is associated with each completed time field by default, press the time field's lookup button to change the date.
  - Type the *Unit Notified* time for this apparatus.
  - Type the *Unit Enroute* time.
  - To indicate that the unit was cancelled, check *Cancelled* and type the cancelled time.
  - Type the *Arrived Scene* time of arrival.
  - Type the *Arrived Pt/Vict* time personnel arrived at the patient or victim.
  - Type the *Transfer of Care* time when patient responsibility has been changed to another service agency.
  - Type the *Enroute to Dest* time the unit left scene for the destination (e.g., hospital).
  - Type the *Arrived Dest* time the unit arrived at their destination (e.g., hospital).
  - Type the *Cleared* time that this unit cleared the scene.
  - Type the *Back In Svc* time the unit was back in service.
  - Type the *Back at Home* time when the unit has returned to its service agency.
- Press **Response Time Analysis** to display a summary of calculated response times for this incident based on entries in the **Times** areas.
- Complete additional information as needed.
- Save and close EMS patient record.

To Complete Patient Scene Information

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.

- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Scene* tab.
- Complete **Patient/Victim** area fields.

NOTICE
Other Detail Reports

The steps to add Vehicle Incident and Search & Rescue reports are detailed separately, below.

- Select appropriate **Patient Past Medical History and Alerts** area option. If Yes, press Details and add the relevant details.
- Select appropriate **Aid Given to Patient/Victim Prior to Arrival?** area option. If **Yes**, press **Details** and add code(s) indicating the type of aid provided to patient/victim prior to unit's arrival.
- Select appropriate **Scene Factors Affecting Response/EMS Care?** area option. If **Yes**, press **Details** and add code(s) indicating scene factors patient/victim prior to unit's arrival.
- Select appropriate **Human Factors Affecting Response/EMS Care?** area option. If **Yes**, press **Details** and add code(s) describing the human factors that contributed to the patient's injury.
- Select appropriate **Patient Safety Equipment Worn or Deployed?** area option. If **Yes**, press **Details** and add code(s) describing safety equipment worn or used by the patient/victim.
- Type or look up the *Initial Observed Condition*.
- Select whether the patient has an injury or illness in the *Injury or Illness* field.
- Save and close.

To Add Vehicle Accident Information

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Scene* tab.
- Press **Vehicle/Accident Extrication** to add vehicle accident/extrication details. The **Vehicle/Accident Extrication** form is displayed.
  - Complete fields as needed.
  - Save then close to return to the **Patient/Victim Information** form.
- Save and close.

Add Search & Rescue Report

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Scene* tab.
- Press **Search & Rescue**. The **Search & Rescue** form is displayed.
  - Add **Trench or Confined Space Rescue** area information, or check *Not Applicable*.
  - Add **Low or High Angle Rescue System Used** area information, or check *Not Applicable*.
  - Complete remaining information as needed, then save and close to return to the **Patient/Victim Information** form.
- Save and close.

To Add Patient Clinical Complaint Information

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Clinical* tab, *Complaint* tab.
- Type or look up the patient/victim's *Chief Complaint*. Previous complaints used in other patient/victim records are available for lookup.
- Complete **Signs & Symptoms** area. Signs and symptoms relate to the chief complaint. You will have the opportunity to complete additional signs and symptoms for individual injury and illness details if necessary.
- Complete remaining information as needed.
- Save and close patient/victim record.

To Add Patient Clinical Provider Information

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.

  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Clinical* tab, *Provider* tab.
- Type or look up the *Initial* EMS level of the first EMS care provider to arrive at the patient/victim and the *Highest* level of EMS care provider.
- Type or look up the **Provider Impression** area *Primary* provider impression code indicating the provider's primary assessment of the cause of the patient/victim's symptoms.
- Select values for **CMS Condition Codes, Patient/Staff Exposures**, and **Exposure Precautions Taken** areas and add details if *Yes*.

> **NOTICE**
> All Responding Personnel
>
> You can add all responding personnel when adding an exposures and/or precaution detail record by selecting 'All Responding Personnel' from the *Staff ID* lookup.

- Complete other fields as needed.
- Save and close.

To Add Injury Illness Details

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Clinical* tab, *Injury/Illness Codes* tab.
- Press **Add** to add a injury illness detail, or **Add Group** to add multiple injury/illness details (multiple injury/illness types for multiple body sites).
- Complete fields as needed, then save and close.
- Save and close.

To Complete the Injury Matrix

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.

- Highlight a patient and press **Open**.
- Click the *Clinical* tab, *Injury Matrix* tab.
- Press **Include Injury Matrix** if section is not already enabled.
- Select area of body and extent of injury as necessary.
- Save and close.

To Complete Cardiac Arrest & CPR

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
    - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
    - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Clinical* tab, *Cardiac Arrest & CPR* tab.
- If *Provider Impression* in the **Patient/Victim Information** form *Clinical* section *Base Clinical* section does not indicate a cardiac arrest, press **Include Cardiac Arrest**.
- Add cardiac arrest information.
- Save and close.

To Add Device Data

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
    - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
    - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Clinical* tab, *Device Data* tab.
- Press **Add**. The **Medical Device Data** form is completed.
- Complete fields as needed.
- Save and close Medical Device Data record.
- Save and close patient record when finished.

To Add Patient Vitals and Assessments

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
    - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.

- If the **Query** form is displayed, you are ready to select an incident then press **OK**.

- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Assessments & Treatments* tab.

  If *Use Auto Increment* is checked, either the *Arrived Pt/Vict* time or the highlighted vital/procedure/medication time plus the interval specified in *Auto Increment* is used in the detail record time. Uncheck *Use Auto Increment* to leave the detail record time blank. You can specify the interval to add before vital/procedure/medication records via the **Administrative Options** form *EMS/Search & Rescue* section *Assessments & Treatments* section.

- Press **Add Vitals/Ax**. Patient vitals and assessment fields are displayed.
- *Time* is automatically filled in based on the *Arrived Scene* time plus any time added for vital/procedure/medication records. Change if necessary.
- Complete information in the *Basic*, *Observation*, *Notes*, and *Other* sections as needed.
- To add additional detail records, set the *Auto Increment Value* and check *Use Auto Increment* to automatically complete detail times, or uncheck *Use Auto Increment* to leave the detail time incomplete, and:
  - Press **Rplcat** to save and add another record.
  - Press **Vital** to save and add an additional vital/assessment.
  - Press **Proc** to save and add a procedure.
  - Press **Med** to save and add a medication.
  - Press **Save** to add the record to the *Assessments and Treatments* list.
- To leave without adding record, press **Cancel**.
- Press **Close**.
- Save and close patient record.

Add Patient Procedure

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Assessments & Treatments* tab.

If *Use Auto Increment* is checked, either the *Arrived Pt/Vict* time or the highlighted vital/procedure/medication time plus the interval specified in *Auto Increment* is used in the detail record time. Uncheck *Use Auto Increment* to leave the detail record time blank. You can specify the interval to add before vital/procedure/medication records via the **Administrative Options** form *EMS/Search & Rescue* section *Assessments & Treatments* section.

- Press **Add Procedure**.
- *Time* is automatically filled in based on the *Arrived Scene* time plus any time added for vital/procedure/medication records. Change if necessary. Change if necessary.
- Type or look up the *Procedure Code* for the type of procedure performed. Note that a default fee can be associated with a procedure code.
- Complete additional information as needed.
- Track consumable items used for the procedure in the *Usage* section.
- To add additional detail records, set the *Auto Increment Value* and check *Use Auto Increment* to automatically complete detail times, or uncheck *Use Auto Increment* to leave the detail time incomplete, and:
  - Press **Rplcat** to save and add another record.
  - Press **Vital** to save and add an additional vital/assessment.
  - Press **Proc** to save and add a procedure.
  - Press **Med** to save and add a medication.
  - Press **Save** to add the record to the *Assessments and Treatments* list.
- To leave without adding record, press **Cancel**.
- Press **Close**.
- Save and close patient record.

Add Patient Medication

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Assessments & Treatments* tab.
- Press **Add Medication**.

- *Time* is automatically filled in based on the *Arrived Scene* time plus any time added for vital/procedure/medication records. Change if necessary. Change if necessary.
- Type or look up the *Medication Code*. Note that a default fee can be associated with the *Medication Codes* lookup code.
- Complete additional information as needed.
- Track consumable items used for the procedure in the *Usage* section.
- To add additional detail records, set the *Auto Increment Value* and check *Use Auto Increment* to automatically complete detail times, or uncheck *Use Auto Increment* to leave the detail time incomplete, and:
  - Press **Rplcat** to save and add another record.
  - Press **Vital** to save and add an additional vital/assessment.
  - Press **Proc** to save and add a procedure.
  - Press **Med** to save and add a medication.
  - Press **Save** to add the record to the *Assessments and Treatments* list.
- To leave without adding record, press **Cancel**.
- Press **Close**.
- Save and close patient record.

To Replicate Patient Assessments/Procedures/Medications

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Assessments & Treatments* tab.
- To automatically determine the time for the detail record based on the highlighted record, check *Use Auto Increment* and specify the *Auto Increment* value.
- Highlight record to replicate.
- Press **Replicate**.
- Complete remaining fields as needed.
- To add additional detail records, set the *Auto Increment Value* and check *Use Auto Increment* to automatically complete detail times, or uncheck *Use Auto Increment* to leave the detail time incomplete, and:
  - Press **Rplcat** to save and add another record.
  - Press **Vital** to save and add an additional vital/assessment.
  - Press **Proc** to save and add a procedure.

  - Press **Med** to save and add a medication.
  - Press **Save** to add the record to the *Assessments and Treatments* list.
- To leave without adding record, press **Cancel**.
- Press **Close**.
- Save and close patient record.

To Add Patient Status & Transport Information

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Status & Transport* tab.
- Complete fields as needed.
- Save and close.

To Track HIPAA Notices

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Status & Transport* tab.
- Press **Privacy Policy Status**.
- Select appropriate status:
  - If the HIPAA notice was handed out at the incident scene check *Given During Call*. *Date* is filled in. Press **OK**.
  - If the notice was mailed, check *Mailed* and leave date blank. You must batch print HIPAA notices and the date will be filled in. Press **OK**.
  - If the notice was sent via some other method, check *Other* and note the method. Press **OK**.
- Save and close patient record.

To Add a Patient Narrative

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Patient Narrative* tab.
- Add patient narrative.
- Save and close patient record.

To Complete Patient User Fields

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Other* tab.
- Press **User Fields**.
- Complete applicable fields.

The steps to add user-defined fields are detailed in the Advance Feature Reference.

To Attach Files and Signatures to EMS Patient

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Other* tab.
- Press **Attachments & Signatures**.

See 'Attach File to Record' on page 220 for details.

To Manually Lock Patient Record

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.

- If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
- If the **Query** form is displayed, you are ready to select an incident then press **OK**.

- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Other* tab.
- Press **Record Lock Status**.

The lock status of the report is displayed. Click *Manual Lock* to lock the report. User name is entered and only the user or an administrator can modify the incident.

To Display EMS Patient Completion Status

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Patient/Victims* tab.
- Highlight a patient and press **Open**.
- Click the *Other* tab.
- Press **Display Report Completion Status** to display validation results for the report, including a listing of incomplete items (if incomplete).

Adding Additional Reports to EMS Reports

There are additional reports that can be added or reviewed from an EMS incident including NFIRS incidents, and equipment used.

To Initiate NFIRS Incident Report from EMS

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or `Ctrl + O`), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Additional Reports* tab.
- Press **NFIRS Incident Report**.

- If *Use abbreviated form when starting NFIRS report from EMS* is enabled via the **Administrative Options** form *Incident* section *EMS/Search & Rescue* subsection the **Initiate NFIRS Report** form is displayed.
  - Complete required and known fields, then press **OK**.
- Complete **NFIRS Incident Report**.

Adding an Incident Report is detailed starting page 136.

To Add Equipment Used

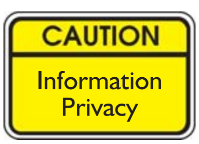
- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Additional Reports* tab.
- Press **Equipment Used** to add equipment usage records for equipment used for this EMS Search & Rescue incident. Adding equipment usage records for an EMS Search & Rescue report is the same for Incident Reports.

See page 160 for equipment usage details.

- Save and close.

About the EMS Incident Narrative

General information about the EMS incident can be added for an incident.



We strongly recommend against adding specific patient information to the main EMS incident narrative.

Complete EMS Incident Report Narrative Section

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Incident Narrative* tab.
- Type notes for the EMS incident. Press **`F7`** to spell check the narrative. There is also a narrative for each patient. To prevent breaching the security of patient data, we recommend that you do not include patient information in the *Incident Narrative* section.

- Save and close.

About Other EMS Records

There are other EMS related records that can be added to EMS incidents, including user-defined fields, attachments and signatures, record lock status, record modification history, and state import/export history.

To Add User Fields

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Other* tab.
- Press **User Fields**.
- Complete applicable fields.

The steps to add user-defined fields are detailed in the Advance Feature Reference.

- Save and close user-defined field form.
- Save and close.

To Attach Files and Signatures to EMS Incident

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Other* tab.
- Press **Attachments**.

See ‘Attach File to Record’ on page 220 for details.

- Save and close **Attachments & Signatures** form.
- Save and close.

To Manually Lock Records

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.

- If the **Query** form is displayed, you are ready to select an incident then press **OK**.

- Click the *Other* tab.
- Press **Record Lock Status**.

  The lock status of the report is displayed. Click *Manual Lock* to lock the report. User name is entered and only the user or an administrator can modify the incident. Press **OK**.

- Save and close.

To Review State Import/Export History

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Other* tab.
- Press **State Import/Export History**. The **EMS State Import/Export Status** form is displayed.
- Press **Import Log** to display import history.
- Press **Export Log** to display EMS export history.
- Press **OK**.
- Save and close.

To Display EMS Incident Report Completion Status

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **Browse** (or **`Ctrl + O`**), highlight the record then press **OK**.
  - If the **Query** form is displayed, you are ready to select an incident then press **OK**.
- Click the *Other* tab.
- Press **Display Report Completion Status** to display validation results for the report, including a listing of incomplete items (if incomplete).
- Press **OK**.
- Save and close.

Chapter 13

Dispatch/Remote Station Incident Reporting

There are two separate types of records added to Dispatch/Remote Station Incident Reporting. Dispatch reports are abbreviated NFIRS or EMS incidents. Remote Station Incidents are responding units and personnel information entered at an outlying station to be merged with an incident added at a central station using import/export.

Adding Dispatch or Remote Station Report

Dispatch reports are abbreviated NFIRS or EMS incidents that are useful for initiating a basic report that can be completed later. Remote station incident response records allow responding unit and personnel records to be added from a remote location where the incident record has not been added, then the unit and personnel response records are merged to the incident using the Import/Export feature.

Adding Dispatch Reports

When incident reports are added as dispatch reports, information is entered, the incident is marked as finished, and incident data is transferred to the NFIRS or EMS area, and at the same time, removed from the dispatch/remote station incident area.

To Add Basic Dispatch/Remote Incident Report

- Select the **File** menu, **Dispatch & Remote Station Response Entry** option (or press **`Ctrl + I`**). Start with the fields at the top. The following data elements are the minimum required for an incident report.
- Type the month, day, and year of the incident in *Alarm Date*. This date is when the alarm was received by the fire department and must be the same as the date for the alarm time. The *Alarm Date*, in conjunction with the other required fields (*FDID*, *Alarm Time*, *Incident Number*), uniquely identifies each incident.
- Type the *Alarm Time* that the alarm was received by the fire department. Use military time. Required for all incidents.
- Type the *Incident Number*. This number is used to identify a particular incident and to tie data from different modules together. Enter the number assigned to the incident. It may be necessary to obtain this number from an alarm or dispatch center, or press **`Tab`** and FH automatically assigns the next highest available incident number. It must be unique for each *FDID*/*Alarm Date*/*Alarm Time*.
- The fields required to complete an incident address vary based on the *Address Type* value. Selections are "Street Address", "Intersection", "Rural/Directions", or "National Grid". Address information is required by state and local governments to establish a legal report reference. If the incident is a Wildland fire, "Rural/Directions" should be selected, and you can check *Address on Wildland Report* to use the address entered on the Wildland report

- Type or look up the *City*, *State*, *ZIP* where the incident occurred (the three fields are part of a single lookup). If the incident occurred in an unincorporated area, use the city found in the mailing address for the incident location. These fields complete the full address of the incident and provides a means of linking fire incident data to other geographic and population factors for comparative analysis at the local and regional levels.
- Check *NFIRS Incident Report* if this incident is a NFIRS incident report.
- Check *EMS/Search & Rescue Incident Report* if this incident is an EMS/Search & Rescue incident report.
- Optionally click *Units & Personnel* and add responding units and personnel.
- Optionally click *Patients/Victims* and add patients. Available only if EMS/Search & Rescue is selected.

See 'To Add Basic Patient Information' on page 192 for detailed instructions.

- Check *This dispatch report is finished* when finished with the dispatch report then press **Save**.

Adding Remote Incident Report

Remote station incident response records are added in the same way as Dispatch reports; however, the incident is not marked as finished. Units and Personnel added for the incident will be included in exports to other stations. A NFIRS or EMS main report will not be created at the remote station, and the remote station response incident remains in the dispatch/remote station incident area.

To Add Remote Incident Report

- Select the **File** menu, **Dispatch & Remote Station Response Entry** option (or press **`Ctrl + I`**). Start with the fields at the top. The following data elements are the minimum required for an incident report.
- Type the month, day, and year of the incident in *Alarm Date*. This date is when the alarm was received by the fire department and must be the same as the date for the alarm time. The Alarm Date, in conjunction with the other required fields (*FDID*, *Alarm Time*, *Incident Number*), uniquely identifies each incident.
- Type the *Alarm Time* that the alarm was received by the fire department. Use military time. Required for all incidents.
- Type the *Incident Number*. This number is used to identify a particular incident and to tie data from different modules together. Enter the number assigned to the incident. It may be necessary to obtain this number from an alarm or dispatch center, or press **`Tab`** and FH automatically assigns the next highest available incident number. It must be unique for each *FDID/Alarm Date/Alarm Time*.

- The fields required to complete an incident address vary based on the *Scene Address Type* value. Selections are *Street Address*, *Intersection*, or *Rural/Directions*. Address information is required by state and local governments to establish a legal report reference. If the incident is a Wildland fire, *Rural/Directions* should be selected, and you can check *Address on Wildland Report* to use the address entered on the Wildland report
- Type or look up the *City*, *State*, *ZIP* where the incident occurred (the three fields are part of a single lookup). If the incident occurred in an unincorporated area, use the city found in the mailing address for the incident location. These fields complete the full address of the incident and provides a means of linking fire incident data to other geographic and population factors for comparative analysis at the local and regional levels.
- Check *NFIRS Incident Report* if this incident is a NFIRS incident report.
- Check *EMS/Search & Rescue Incident Report* if this incident is an EMS/Search & Rescue incident report.
- Optionally click *Units & Personnel* and add responding units and personnel.
- Optionally click *Patients/Victims* and add patients. Available only if EMS/Search & Rescue is selected.

See "To Add Basic Patient Information" on page 192 for detailed instructions.

- Click the *Narrative/Finish* tab.
- Check *Append this narrative to existing narrative for this incident report on import* to add the narrative to the end of any existing incident narrative when it is exported/imported to the central station (for remote station responses).
- Save and close.

The remote response record is ready to be exported. See the next topic for the steps to merge remote responses with the incident at the central FH installation.

To Merge Remote Responses to Central Database

- From remote station, select the **File** menu **Station Management** option **Export Data to Station** option.
- Select *Dispatch & Remote Station Incident Reports* then specify additional criteria for export.

Additional information on using export to station is included in the Advanced Feature Reference "Station Management" chapter.

- At the central station, select the **File** menu **Station Management** option **Import Data from Station** option.
- Select the directory containing the export file created by the remote station, then press **OK**.

Chapter 14

Hydrant Management

Maintain complete records of hydrants and hydrant-related activities.

Adding Hydrant Records

Hydrant records include basic hydrant information like make, owner, and capacity, and provides the ability for tracking hydrant activities like inspections, repairs, and flow tests.

To add records, the record form must be opened. How you open a form is defined in the **Workstation Options** form *General* section *Data Entry Forms* section (**Tools** menu, **Workstation Options** or, if individual preferences is enabled, **Tools** menu, **User Preference** option).

To Add New Hydrant Record

- From the **File** menu, select the **Hydrant Management** option **Hydrant Master Records** option.
  - If the **Hydrant** form is displayed, press **New** (or `Ctrl + N`) to add a new record.
  - If the **Query** form is displayed, press **Cancel** to add a new record.
- Type or look up the *Number*, *Prefix*, *Street/Highway* and *Type*.
- Type the *Hydrant No.* that uniquely identify the hydrant.
- Complete hydrant *Specifications* area values as needed:
  - Type or look up the *Hydrant Class*. Use the *Class* code to specify available types of hydrant records.
  - Type or look up the *Main Type* the hydrant is connected to.
- Complete remaining hydrant values as needed. Save and close when finished.

Add Hydrant Contacts

- From the **File** menu, select the **Hydrant Management** option **Hydrant Master Records** option.
  - If the **Hydrant** form is displayed, press **Browse** (or `Ctrl + O`) to display a list of records, select record then press **OK**.
  - If the **Query** form is displayed, select a record then press **OK**.
- Click the *Contacts* tab.
- Press **Add** to add hydrant owners and/or purveyors, or other contacts for the specific hydrant.
- Save and close.

Add Hydrant Service Activity

- From the **File** menu, select the **Hydrant Management** option **Hydrant Master Records** option.
  - If the **Hydrant** form is displayed, press **Browse** (or **`Ctrl + O`**) to display a list of records, select record then press **OK**.
  - If the **Query** form is displayed, select a record then press **OK**.
- Click the *Activities* tab.
- Press **Add**. The **Hydrant Activity** form is displayed.
- Select *Scheduled* or *Completed*, then type the start date and time, and end date and time.
- Type or look up the Staff ID of the member completing the service activity in the *Inspector* field.

> **NOTICE**
> To Track Staff Time
>
> Complete a staff activity for the hydrant activity/repair record from the **Hydrant Activity** form *Other* section if you want to track staff time for the activity and associate the activity with staff records.

- Click the *Activity/Repair* tab.
- Select the activities performed for the inspection/repair activity. If a repair was made, add a defect to the defects area by pressing (add one) or (add multiple) and check *Repaired* for repaired defects.
- Complete additional hydrant activity information as needed.
- Save and close hydrant activity when finished.
- Save and close.

Add Hydrant Flow Tests

- From the **File** menu, select the **Hydrant Management** option **Hydrant Master Records** option.
  - If the **Hydrant** form is displayed, press **Browse** (or **`Ctrl + O`**) to display a list of records, select record then press **OK**.
  - If the **Query** form is displayed, select a record then press **OK**.
- Click the *Flow Tests* tab.
- Press **Add**. The **Hydrant Activity** form is displayed.
- Select *Scheduled* or *Completed*, then type the start date and time, and end date and time.
- Type or look up the Staff ID of the member completing the inspection in the *Inspector* field.

> **NOTICE**
> To Track Staff Time
>
> Complete a staff activity for the hydrant activity/repair record from the **Hydrant Activity** form *Other* section if you want to track staff time for the activity and associate the activity with staff records.

- Click the *Flow Test* tab.

- Type **Measurements** area values. **Flow Calculation Results** area values are automatically calculated. If *Override Automatic Flow Calculations* is checked, you can manually type a flow figure.

NOTICE
Flow Calculations

You can specify custom flow calculations or select from several defined calculation methods via the **Administrative Options** form *Hydrant* section.

- Save and close hydrant activity when finished.
- Save and close.

Chapter 15

Operations

Once records are entered into FIREHOUSE Software, there are many ways the information can be used.

This chapter covers ways to use FH effectively to access the data you have entered and to use the program to simplify entering data, including information about:

- Attach Files to Records
- Export NFIRS Incidents to State
- Using the Department Journal
- Using Reports
- Using Spell Check

Attach a File

The following procedure applies to all areas where you can associate attached files with records. Other section

- Press **Attachments & Signatures**. If you are adding the first attachment, the **Attachments & Signatures** form is displayed. If previous attachments have been added, the attachments list is displayed, and you need to press **Add**.
- With the **Attachments & Signatures** form displayed, press **`F1`** on your keyboard to display the FH Help File. Press **Click** for related topics for instructions on attaching a file.

To view an attached file, highlight the attachment and press **Run It**.

Exporting Transaction Files to State

Transaction files contain standardized details about NFIRS or EMS incident reports that are sent to your state or regional data collection center. The standardized data can be used to track important NFIRS or EMS trends. There are two types transaction files, the incident transaction file that includes incidents for a specific FDID and date range, and the department information file that includes station information, personnel, and unit information for a specific FDID. Typically department information needs to be submitted with the incident transaction files.

Your department information is added to FH in the **Administrative Options** form **License** section (accessed from the **Administration** menu, **Administrative Options** option).

About NFIRS Transaction Files

Note that the station identified as central must include the FDID that you will be exporting. If you need to export incidents for more than one FDID, a station with each FDID needs to be designated as central. Only incidents, staff, and units with the FDID of a station identified as central will be located. Note that you must enter personnel counts to export incidents.

See the FH Help File "Export Multiple FDID Counts" topic for details about including personnel counts for more than one FDID.

To Export NFIRS Transaction File(s)

- From the **File** menu, select the **NFIRS 5.0 Incident Reporting** option, **Export NFIRS 5.0 Export Transaction File** option. The **NFIRS 5.0 Export Wizard** form is displayed.
- Select *Export Completed Incident Transactions and Department Information* and press **Next>**. The **NFIRS 5.0 Export Wizard** form *Incident Report Selection* section is displayed. It is very important that all units and staff have an FDID associated with them if you export department information to the state.
- Specify the *FDID* for which you wish to export department information and incidents. Most departments will have a single FDID, but departments that have multiple FDIDs can leave FDID blank to export all FDIDs simultaneously.

  Before creating export files that include more than one FDID, check with your state to confirm that they can accept a single transaction file that includes multiple FDID numbers before sending. You may need to submit each FDID individually.

- Specify the incident date range to include in *From Date* and *To Date*.
- Check appropriate additional options:
  - Check *Export all records in this range as new transactions even if previously exported* to force all department information and incidents in the specified date range to export even though they have been previously exported. You would want to do this if you had exported department information to the state previously, but for some reason the export was not received by the state.
  - Check *Include any records flagged for resubmission or deletion* to include all of incidents tagged "resubmit" (changed after being exported) or "delete" (deleted after being exported) regardless of incident date.
  - Check *Export narrative fields* to include notes.
  - Check *Export NFIRS EMS transactions* to include optional NFIRS EMS incident data elements (if completed) from incidents in the selected date range.
  - Check *Export special study transaction* to include special study codes included with the incident records. Note that if the special study codes do not match the states special study codes, the state will not be able to use the data.
  - Check *Export state user field transactions* to include values from state user fields.
  - Check *Export local user field transactions* to include values from local user fields.
- Press **Next>**. The **NFIRS 5.0 Export Wizard** form *Output Files* section is displayed.
- Specify file output options. When you select to output both an incident transaction export file and department information, two files are created, the incident transaction file and the department information file.
  - Incident Transaction File: A copy of the incident transaction export file is placed in a subfolder in the program directory (default is **C:\Program Files\FIREHOUSE Software**) named **NFIRS**. You are given additional options for creating additional copies of the file later in the export process. Incident transaction file name is based on State, FDID, and To Date with a INC extension. For example, a Pennsylvania department with FDID 20007 with a to date of 03/01/06 would result in a incident transaction file name of **PA20007032006.INC** (EMS incident exports have an "EMS" extension).
  - Department Information File: A copy of the department information export file is placed in a subfolder in the program directory (default is **C:\Program Files\FIREHOUSE Software**) named **NFIRS**. You are given additional options for creating additional copies of the file later in the export process. Departmental transaction file name is based on State, FDID with a DEP extension. For example, Pennsylvania department with FDID 20007 would result in a departmental transaction file name of **PA20007.DEP**.

NOTICE

Backup Copy

If the state contacts your department for a transaction file you have already sent, you can resend the file in the export folder (default is **`C:\Program Files\FIREHOUSE Software\NFIRS`**) rather than recreating the file.

- Check *Wipe disk before saving* if you want to remove files from the specified directory before exporting.
- Check *Write protect all output files when done* if you want to make the transaction files write-protected.

- Press **Next>**. The **NFIRS 5.0 Export Wizard** form *Completion* section is displayed.
- The file(s) are always created in the program directory (default is **`C:\Program Files\FIREHOUSE Software\)`** **NFIRS** subdirectory. You can specify additional file actions:
  - Select *No, just leave the file on the hard drive* to manually copy the files if needed.
  - Select *Yes, copy the file(s) to the removable disk in drive* to send a copy of the file to the selected available disk drive. Insert media into the selected drive now.
    - Optionally check *Wipe disk* to remove files from the selected diskette.
  - Select *Yes, transmit the file(s) to an internet site via FTP* to send the file(s) to a site.
  - Check *Yes, attach the file(s) to and send an e-mail message* to send the file(s) via email.
- Press **Next>**. If you are FTPing or emailing the file(s), define the FTP or email information then press **Next>**. The **NFIRS 5.0 Export Wizard** form *Finish* section is displayed.

See the FH Help File ‘Export to State Procedure; topic for information on specifying FTP or email information.

- Review the description of the process. Press **<Back** at any time to make changes. Press **Finish** to create the transaction file.

You have created the NFIRS transaction files.

About EMS Transaction Files

Some states and collection agencies receive transaction files generated via the **Administration** menu **Database Administration** option **Custom Data Export** option. We recommend that you verify the expected format for EMS transaction files before performing the steps below.

To Export EMS Transaction File(s)

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option, **Export EMS Transaction File** option. The **NFIRS 5.0 Export Wizard** form is displayed.
- Select *Export Completed Incident Transactions and Department Information* and press **Next>**. The **EMS Export Wizard** form *Incident Report Selection* section is displayed.
- Specify the EMS *Service #* for which you wish to export department information and incidents.
- Specify the incident date range to include in *From Date* and *To Date*.
- Check appropriate additional options:
  - Check *Export all records in this range as new transactions even if previously exported* to force all department information and incidents in the specified date range to export even though they have been previously exported. You would want to do this if you had exported department information to the state previously, but for some reason the export was not received by the state.
  - Check *Include any records flagged for resubmission or deletion* to include all of incidents tagged "resubmit" (changed after being exported) or "delete" (deleted after being exported) regardless of incident date.
  - Check *Export narrative fields* to include notes fields.
  - Check *Export patient confidential information* to include confidential information in the export. Note that the transaction file is not encrypted.
  - Check *Export patient billing information* to include EMS billing fields in the export.
  - Check *Export EMS special study transactions* to include special study codes included with the incident records. Note that if the special study codes do not match the states special study codes, the state will not be able to use the data.
  - Check *Export state user field transactions* to include values from state user fields.
  - Check *Export local user field transactions* to include values from local user fields.
- Press **Next>**. The **EMS Export Wizard** form *Output Files* section is displayed.
- Specify file output options. When you select to output both an incident transaction export file and department information, two files are created, the incident transaction file and the department information file.
  - Incident Transaction File: A copy of the incident transaction export file is placed in a subfolder in the program directory (default is **`C:\Program Files\FIREHOUSE Software\`**) named **EMS**. You are given additional options for creating additional copies of the file later in the export process.

- Department Information File: A copy of the department information export file is placed in a subfolder in the program directory (default is **`C:\Program Files\FIREHOUSE Software\`**) named **`EMS`**. You are given additional options for creating additional copies of the file later in the export process.

NOTICE
Backup Copy

If the state contacts your department for a transaction file you have already sent, you can resend the file in the export folder (default is **`C:\Program Files\FIREHOUSE Software\EMS`**) rather than recreating the file.

  - Check *Wipe disk before saving* if you want to remove files from the specified directory before exporting.
  - Check *Write protect all output files when done* if you want to make the transaction files write-protected.
- Press **Next>**. The **EMS Export Wizard** form *Completion* section is displayed.
- The file(s) are always created in the program directory (default is **`C:\Program Files\FIREHOUSE Software\)`** **`EMS`** subdirectory. You can specify additional file actions:
  - Select *No, just leave the file on the hard drive* to manually copy the files if needed.
  - Select *Yes, copy the file(s) to the removable disk in drive* to send a copy of the file to the selected available disk drive. Insert media into the selected drive now.
    - Optionally check *Wipe disk* to remove files from the selected diskette.
  - Select *Yes, transmit the file(s) to an internet site via FTP* to send the file(s) to a site.
  - Check *Yes, attach the file(s) to and send an e-mail message* to send the file(s) via email.
- Press **Next>**. If you are FTPing or emailing the file(s), define the FTP or email information then press **Next>**. The **EMS Export Wizard** form *Finish* section is displayed.

See the FH Help File "Export to State Procedure" topic for information on specifying FTP or email information.

- Review the description of the process. Press **<Back** at any time to make changes. Press **Finish** to create the transaction file.

You have created the EMS transaction files.

Using the Department Journal

The Department Journal is the central command system that graphically displays all of your department events on a calendar. Displayed events include department events, fire and medical incidents, occupancy activities, equipment maintenance/testing, training classes, non-incident activities, and hydrant flow tests/repairs.

About Event Display

You can specify what events will be displayed by browsing the month and year displayed or by selecting a specific date. When a specific date is selected, you go directly to the specified date without querying to display events for the month and year, so this is the recommended method when using the journal in a system with numerous records. You can also filter events by station(s), shift(s), or unit(s), limit events to specific shift time ranges, and select which records to include. Events added after the **Department Journal** form is displayed are not automatically added, but can be included by pressing **Requery**.

NOTICE

Day Journal is optimized for displaying numerous records. When enabled, the Department Journal (Day Mode) displays events for a selected day. Station filtering options are not available and you can not initiate new records. Day mode is enabled via the **Workstation Options** form *Other* section *Journals & Reminders* section only a single day is displayed).

To Browse Month and Year

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- In the month area above the calendar, press to move to the previous month, or to move to the next month.
- In the year area above the calendar, press to move to the previous month, or to move to the next month.
- Click a specific day to view a list of events for the day.
- Press **Close** if finished.

To View a Selected Date

- Select the **File** menu **Department Journal** option.
- Press **Options**, then select the **Select Date** option.

- Specify a *Select Date* value, or press **Calendar** and select a date then press **OK**.
- Press **OK**.
- Press **Close** if finished.

To Set Filtering

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Press **Filtering**. The **Filtering Options** form is displayed.

You can select more than one code for station, shift, and unit. See the FH Help File, access the Search tab, then type "Select Multiple Records".

  - Type or look up *Station(s)* to filter the department journal for specific stations.
  - Type or look up *Shift(s)* to filter the department journal for specific shifts.
  - Type or look up *Unit(s)* to filter the department journal for specific units.
  - Type or look up *Staff Member(s)* to filter the department journal for specific staff member activities.
  - Check *Ignore items without Station, Shift, or Unit* to exclude events with blank *Station*, *Shift*, or *Unit* values (only events that have an explicit match in *Station*, *Shift*, or *Unit* are included).
- Press **Apply Filter** to apply entered values and view results.
- Press **Close** to close the **Filtering Options** form.
- Press **Close** if finished.

To Set Shift Times

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Press **Shift Times**. The **Shift Times** form is displayed.
- Type the *Shift Length* and *Start Time*.
- Press **Apply Filter** to apply entered values and view results.
- Press **Close** to close the **Shift Times** form.
- Press **Close** to close the **Department Journal** form.

To Specify Event Types to Display

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Select the event types to include in the journal. A specific event is selected when it is "pressed down" (like this ):
  - Press  to include fire incident reports.

- Press to include EMS incident reports.
- Press to include dispatch/remote incident reports
- Press to include department events.
- Press to include training classes.
- Press to include non-incident activities.
- Press to include expired permits.
- Press to include occupancy inspections and activities.
- Press to include inventory maintenance and test records.
- Press to include hydrant activities.

- Press **Close** when finished.

To Display Events Added After Department Journal Display

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Press **Requery**. Events added after the **Department Journal** was accessed are included in the calendar.
- Press **Close** when finished.

Opening and Editing Events from the Journal

You can view a displayed record directly from the department journal.

To Open Event from Journal

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Double-click the text description for the event you want to display. The event is opened.
- Save and close event form when finished.
- Press **Close** when finished.

To Add New Records from Journal

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Press **New** then select the entry type. Valid types:
    - Dispatch/Remote Station Incident Report.
    - NFIRS 5.0 Incident Report.
    - EMS/Search & Rescue Incident Report.
    - Incident investigation.
    - Department Event.

- Training Class.
- Staff Activity.
- Occupancy.
- Occupancy Inspection/Activity.
- Apparatus, Equipment or Inventory Item.
- Apparatus/Equipment Maintenance.
- Inventory Usage.
- Hydrant.
- Hydrant Flow Test/Activity.

- When you select the type, the appropriate form is displayed, ready for data entry.
- Add information as needed, then save and close.
- Press **Close** when finished.

Send a Message

Send messages to specific users/staff within FH. FH messaging creates multiple notes on save so they can be deleted individually. FH Internal Messages can be sent to all FH users, specific staff members by name/station assignment/rank/status (if a Staff ID is associated with an FH user login record), or specific users or user groups if you do not associate Staff ID with FH login records.

Sending and Receiving Messages

FH Messaging checks for unread messages at a user-defined interval and automatically displays a message when a message for the currently logged in user is received.

To Send a Message

- From the **Tools** menu, select the **Send Message** option.
- Select the message recipient(s):
  - Recipient groups are displayed, select the box to the left of the recipient to select all members in the group or display the members of the group by pressing the plus box and selecting individually.
- Type the message in the **Enter Message Text Below** area.
- Specify a *This note will be automatically deleted* date to automatically delete the message on the specified date, or leave the date blank to keep the message until it is manually deleted.
- Press **Send**.
- Press **OK** to prompt.

When the recipient logs in to FH or, if polling is enabled, the specified interval passes, they are notified that they have a message to read.

Printed Reports and Queries

Printed reports provide access to all of the data your department has entered. FH includes more than 300 preset reports, so reports that detail a wide range of activities and different situations are available. Printed reports are not limited to print, they can be viewed on the screen and output to a variety of different formats. Queries are used to browse FH records, and can be used to output FH data to a variety of formats.

To Run a Report

- From the **Reports** menu, select the area containing the report. The **Reports** form is displayed.

  NOTICE
  Report Tip

  Add frequently run reports to your report shortcuts to save time. If you are not sure where to look for a specific report, try the search feature. Press **Find**.

- Highlight the report, then press **Run**. The **Output Report To** form is displayed.
- Select an output format.
  - Select *Screen* if you want to preview the report before printing.
  - Select *Default Printer* to use the printer set up as the workstation default. If you need to change default printer settings press **Printer Setup** at the bottom of the form and select the printer to use as the default printer for all Windows applications.
  - Select *Select Printer* to specify a printer to direct the report to a printer other than the default without changing the default printer.
  - Select *HTML (Graphical)* to output the report in HTML format. HTML files can be viewed and printed by many software programs (all internet browsers and many text editing programs).
  - Select *PDF* to output the report in a PDF format. PDF files can be viewed and printed by Adobe® Reader®, free software available from Adobe.
  - Select *Other File Type* and select from external data formats like Excel compatible spreadsheet (only available when output results in formatted tables).
- Press **OK**.

- If the report does not include any filters, the report is output as specified.
- If the report includes user-specified filters, the **Query Parameters** form is displayed.
  - For each listed parameter, you can specify criteria (for example, equal to, less than, etc.), and enter a value. Leaving a parameter without a specified value includes all available records (that is, all possible records are included).

NOTICE
Parameters

You generally will not need to modify the parameters. Check *Not* to include records that do not have the value specified in the *Value* field. Lookup values, if available, can be displayed by pressing in the *?* field. Check *Case* to ignore capitalization of the parameter value. Specify “And” or “Or” in *Logical*. “And” is most common, “Or” will result in values if either parameter values is present, “And” will exclude values if either parameter value is not present. In some instances, you can lookup the *Value*.

If the **Add** button is accessible, you can press **Add** to add additional parameters. If the *Having* section is accessible, you can add additional parameters. The difference between the *Filter* and *Having* section is the *Filter* section filters out data before it is included in the results table. The *Having* section filters out data that is included in the results table.

  - Press **Run Query** to run the report and all records that match the specified criteria are displayed.

To Run a Query

- From the **Tools** menu, select the **Queries** option. The **Queries** form is displayed.
- Highlight a query, then press **Run**.
  - If the report includes filters, the **Query Parameters** form is displayed. Enter parameter values then press **Run Query**.

  You can output queries to a printer or external file format, or copy the query results to the Windows clipboard to be pasted into an external program.

- To output to a report, printer, or external file format, press . The **Output Report To** form is displayed:
  - Select an output format.
    - Select *Screen* if you want to preview the report before printing.

        - Select *Default Printer* to use the printer set up as the workstation default. If you need to change default printer settings press **Printer Setup** at the bottom of the form and select the printer to use as the default printer for all Windows applications.
        - Select *Select Printer* to specify a printer to direct the report to a printer other than the default without changing the default printer.
        - Select *HTML (Graphical)* to output the report in HTML format. HTML files can be viewed and printed by many software programs (all internet browsers and many text editing programs).
        - Select *PDF* to output the report in a PDF format. PDF files can be viewed and printed by Adobe® Reader®, free software available from Adobe.
        - Select *Other File Type* and select from external data formats like Excel compatible spreadsheet (only available when output results in formatted tables).
        - Press **OK**.
    - Press **Close**.
- To output a report to the Windows clipboard:
    - Press  then press **OK** to prompt.
    - The records are inserted into the clipboard and ready to be pasted into another application. The `Ctrl+V` keyboard key pastes the Windows clipboard contents into the active application.
- Press **Close**. You can select other queries to run, or press **Close** if finished.

Set Spell Check Options

You can customize spell check functionality to tailor the spell check to your department's needs.

About Basic Spell Check Settings

Spell Check settings provide control over default behavior for spell check. Dictionary files are installed with FH including a dictionary of 100,000 general terms and 30,000 medical terms. If necessary you can link to additional dictionary files.

To Set SpellCheck Options

- From the **Administration** menu, select **Administrative Options**. The **Administrative Options** form is displayed.
- Click the *General* tab.
- Press **Options** in the **Spell-Checking** area. The **SpellCheck Options** form *Settings* section is displayed.
- Check individual settings to enable the specific setting.
- Save and close when finished.

To Link to Additional Dictionary Files

- From the **Administration** menu, select **Administrative Options**. The **Administrative Options** form is displayed.
- Click the *General* tab.
- Press **Options** in the **Spell-Checking** area. The **SpellCheck Options** form is displayed.
- Click the *Main Dictionary Files* tab.
- Press **Add**, locate and highlight the additional dictionary file, then press **Open**.
- Check *Include Microsoft Office™ shared dictionaries* to link to custom Office dictionary files.
- Save and close when finished.

About Replacement Text

Spell Check can be set up to ignore words or replace specific words with different words.

To Specify Replacement Text

- From the **Administration** menu, select **Administrative Options**. The **Administrative Options** form is displayed.
- Click the *General* tab.
- Press **SpellCheck Options**. The **SpellCheck Options** form is displayed.
- Press the *User Dictionary Words* tab.
- Press **Add**. The **User Dictionary Word** form is displayed.
- Select an action:
  - *Auto-Correct*. The word typed in the *Word* field is replaced with the word typed in the *Auto-Correct Text* field exactly as entered in the *Auto-Correct Text* field.
  - *Auto-Correct/Preserve Case*. The word typed in the *Word* field is replaced with the word typed in the *Auto-Correct Text* field exactly as the word to replace is typed (i.e., if the word to be replaced is capitalized, the replacement word is also capitalized).
  - *Conditional Correct*. The user is prompted to replace the word typed in the *Word* field with the word typed in the *Auto-Correct Text* field exactly as entered in the *Auto-Correct Text* field.
  - *Conditional Correct/Preserve Case*. The user is prompted to replace the word typed in the *Word* field with the word typed in the *Auto-Correct Text* field exactly as the word to replace is typed (i.e., if the word to be replaced is capitalized, the replacement word is also capitalized).
  - *Exclude*. The word typed in the *Word* field is assumed to be misspelled even if it is included in a dictionary.
  - *Ignore*. The word typed in the *Word* field is assumed to be spelled correctly even if it is not included in a dictionary.
- Press **OK** to update the user dictionary.
- Press **OK** to close Spell Check options.
- Press **OK** to close Administrative options.

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