

Facilities Development Evaluation (FDE) Projects

Preliminary Project Schedule

11/10/03	Logbook Revision Requested
3/1/04	Confirm Requirements
3/3/04	Transfer Requirements to Programmers
3/5/04	Rollout New Version of Logbook
3/8/04	Begin Coding for FDE Projects
4/5/04	Test Version Available
6/14/04	Test Version 492F is available
7/21/04	Test Version 492H is available
8/3/04	429J rolled out to PRODUCTION

Table of Contents

FDE Reviews	3
Business Rules	4
Create New Project Screen	5
Timesheet Screen	6
Project Info Screen.....	7
Review Screen	8
Construction Screen	9
Closure Screen	10
FPS System	11

FDE Reviews

Facilities Development Division is receiving an increasing number of Facilities Development Evaluation (FDE) review requests. These projects are currently only being tracked on paper and/or improperly within the Logbook system, which is creating bad data. FDE projects consist of reviews of Clinics, license status changes, and any no construction cost reviews. In order to track and account for these projects accurately, we must modify the Logbook system to handle them. This document specifies the user requirements for FDE projects within the Logbook system.

Business Rules

- FDE projects can be performed on any facility type.
- Licensed Clinics will be given 3* series facility numbers, paralleling the ALIRTS Perm ID numbers when applicable.
- 3* facilities can only be issued E projects. (No G, S, H, I)
- FDE projects will be designated within the logbook by a standard project number beginning with E (E?#####). E projects will not have sub projects.
- Add new 391 cost code to indicate project will be billed hourly. Description will be FDE Review.
- 391 cost codes can only be used on E projects.
- Geotech reviews will still be billed at the standard \$5000.
- FDE reviews have same review goals and estimated hours as S* projects.
- FDE projects are closed at plan approval after confirmation from user.
- FDE projects are not SB1953 eligible.
- DSE, ACO, FLSO required checkboxes default to null.
- Construction oversight consists of ACO oversight only, no building permit is issued.

Create New Project Screen

Facility group: Ensure facility fields accept 3* facilities.

Project group: Class – Add E to drop down list.

If 3* facility selected, allow only E project class.

Plan Review Code

- Default to 325

- All activity codes, except 330, set cost act code to 391.

- 330 Activity code sets cost act code to 330.

Cost Estimate group: Activity code – Will only allow 391 or 330 activity code.

Construction Cost & Radiology Cost – Not required.

License group: No Change.

Inventory group: SB1953 Const Project – Not visible.

Part J check box – Not visible.

Saving: Same processes without SB1953 confirmation message box.

frmNewProject - OSHPD/FDD Logbook - Create a New Project - version: 487

Facility
 Number Facility Name County Date In
 Project Status

Project
 Class Office Sub Cat Kind Before (Beds) After ACO
 Scope Plan Review Code Mgr

Cost Estimate
 Activity Code Construction Cost Radiology Cost Remark

Licenses - Select Responsible Person
 Architect Mechanical Electrical Structural Contractor/Owner Builder

 GOR IOR#-> LAOR#->

Inventory of Items Received
 Plan Review App. Structural Calcs. Certification of Insurance Use Reserved Project number
 Authorization Letter TIO Program Geo-Tech Part J
 Sets of Plans Building Permit Form Other:
 Demolition Plans Inspector Qualification Form
 Sets of Specifications Contract Information

SB1953 Const Project

Timesheet Screen

Project Number field: Allow E* project numbers.

Enforce same validation rules as S* projects.

FDD TESTING AND DEVELOPMENT VERSION - FDD LogBook Program - Version: 487

File View Reports Utilities About

TimeSheet Project Info Review Construction Closure License 0 Memos 0 Facility

Pick Date Initials BMR Date 2/26/04 Day Thursday Hours 0.00

Last Rutschmann First Brandon Title Staff Services Analyst Region

Print Weekly TimeSheet Save/Recalc

ACT	ProjNum	Sub	PAD	BC	HRS	REMARK
*	ES999999					

Network User: BRUTSCHM 2/26/04 2:21 PM

Project Info Screen

Hide all SB1953 fields and labels, Part J included.

FDD TESTING AND DEVELOPMENT VERSION - FDD LogBook Program - Version: 487 HISTORY

File View Reports Utilities About

TimeSheet **Project Info** Review Construction Closure License 0 Memos 0 Facility

Project ES911460 · 0 Cnty 51 Facno 11116 Kind N Facility Sutter Community Hospital

Status CLSD Scope THIS IS A TEST PROJECT

Date In 11/25/91 Appr Ltr Build Permit Field Accepted Date Closed 1/1/97

PT PJS DSE THL RCD JOS Region NOR Save

ACO SVM FLSO RAD Arch ADL Category

Kind N ~~SB1953 Construction Project? N <-SET~~

Scope THIS IS A TEST PROJECT

Items Received ~~Part J~~

- Application for Plan Review
- Letter of Authorization
- Sets of Plans
- Demolition Plans
- Sets of Specifications
- Structural Calculations
- TIO Program
- Building Permit Form
- Inspector Qualification Form
- Contract Information
- Certification of Insurance
- GeoTech

Other

Network User: BRUTSCHM 2/26/04 2:41 PM

Review Screen

Same Activity Codes as S* projects.

Same Goals as S* projects.

After Plan Approval prompt, prompt the user if they would like to now close this project (default selection to yes). If yes, set the status to CLSD and set the date closed to current date.

When adding plan review activity code, ensure 391 cost code is entered on closure screen. See task 2036.

FDD TESTING AND DEVELOPMENT VERSION - FDD LogBook Program - Version: 487 ACTIVE

File View Reports Utilities About

TimeSheet Project Info **Review** Construction Closure License 0 Memos 0 Facility

Project ES880015 - 0 Cnty 34 Facno 15944 Kind R Facility Sutter Center For Psychiatry

Status ADMN Scope BUILD OUT FOR 4 INTERVIEW OFCS 1 STAFF OFC.

Date In 6/6/89 Appr Ltr Build Permit Field Accepted Date Closed 6/25/91

Records: 1 Contracted Project? N <-SET Delete

ACT	PAD	BCK	INC	MGR	MGR1	MGR0	LT	A	A-in	A-out	AR	M	M-in	M-out	MR	E
▶ 331	0			GSG	6/7/89	6/13/89		GSG		6/7/89	D	Y				X

Checking Plan Approval Intentions!

Does Plan Approval for this E project complete the project?

Yes No

Selecting Yes will close the project and set the date closed.

MGR

Ini GSG Days 6

Act 331 In 6/7/89

Ave Out 6/13/89

Max Ltr AP

ERH 0 Hrs 0

Pad Comments Cleared on

Arch	Mech	Elec	Stru	FLSD	PAD#	BCK#	Inc
Ini GSG	X	X	X		0		
In					Approved CO Cost		
Out 6/7/89					25000		
RoR A					Remark		
Hrs 0	0	0	0	0	(PRELIM.)TEMENT		
ERH 0	0	0	0	0	IMPROVEMENTS LOCAL BUIL		

Network User: BRUTSCHM 2/26/04 2:49 PM

Construction Screen

DSE, FLSO, ACO required boxes set to null by default, allow changing.

If Plan Review Approval Letter and type fields are deleted, set status to OPEN and set Date Closed to null. Also, clears plan approval milestone.

FDD TESTING AND DEVELOPMENT VERSION - FDD LogBook Program - Version: 487 ACTIVE

File View Reports Utilities About

TimeSheet Project Info Review **Construction** Closure License 4 Memos 0 Facility

Project SS999999 - 0 Cnty 50 Facno 11111 Kind R Facility Memorial Hospital Medical Center - Modesto

Status OPEN Scope TEST PROJECT FOR TEST DATABASE

Date In 5/12/97 Appr Ltr 7/9/02 Build Permit 10/23/03 Field Accepted 10/23/03 Date Closed

~~Received 2/6/03 Returned 3/14/03 Accepted 3/18/03
 BP
 IOR 6/26/03 4/15/03 6/25/03 A10109 IOR
 TIO 2/6/03 3/18/03 HARRY MOORE
 TIO Plan Approval Letter Type AP Cleared On
 Plan Review Approval Letter 7/9/02
 Plan Approval Type (AP/AC) AP Cleared On
 Building Permit Issued 10/23/03
 Conditional Permit (Y/N) N
 Construction Start Date ACO Required?
 ACO JGK FLSO LLN DSE SJP FLSO Required?
 DSE Required?~~

Field Staff Report Log			
INI	Date	Percent Done	
BAM	11/25/02	50	
JGK	10/23/03	0	
JGK	10/23/03	100	

Help Add Record Delete

Current Cost 50000
 Rad Eq Cost 0
 Beds Before const. 5
 Beds after const. 10

Network User: BRUTSCHM 3/3/04 9:11 AM

Closure Screen

No closure status business rules apply.

E projects can only have 391 and/or 330 cost codes.

FDD TESTING AND DEVELOPMENT VERSION - FDD LogBook Program - Version: 487 ACTIVE

File View Reports Utilities About

TimeSheet Project Info Review Construction **Closure** License 4 Memos 0 Facility

Project: SS999999 - 0 Cnty: 50 Facno: 11111 Kind: R Facility: Memorial Hospital Medical Center - Modesto

Status: OPEN Scope: TEST PROJECT FOR TEST DATABASE

Date In: 5/12/97 Appr Ltr: 7/9/02 Build Permit: 10/23/03 Field Accepted: 10/23/03 Date Closed:

Date	ACT	Cost Est	Rad Cost	Remark
8/14/02	321	\$50,000.00	\$0.00	
5/29/03	499	\$50,000.00	\$0.00	

Final Verified Compliance Reports Add

	License	Zip	Status	Date		Date	Date
Architect	A123435	01234	A	10/23/03	Plan Approval	7/9/02	First Request Letter 5/29/03
Mechanical	M01525	91941	A	5/2/01	Building Permit	10/23/03	Final Request Letter 5/29/03
Electrical	E00758	92865	A	5/29/03			
Structural					Constr Start		Date Closed
GOR	GE0140	94949	A	5/29/03	Field Accepted	10/23/03	Status: OPEN
Contractor/ Ownr Bldr	gb11722b	90027	A	10/29/02			
IOR	A10109	95269	A	11/15/02	Date Required		

Cancel/reset Save

Network User: BRUTSCHM 3/3/04 9:26 AM

Added 6/11/04: Hide First Request Letter and Final Request Letter fields for E projects only.

Added 7/22/04: Closure letters are not valid for E projects.

FPS System
Allow handling of 391 cost code.

