Backflow Testing Process

Backflow prevention devices (or Backflow preventers) are mechanical plumbing devices that are installed in a plumbing system to prevent water from flowing backward into the central system. A properly installed, tested and maintained Backflow preventer at the service entrance to a property can reliably prevent the backflow of water into the community water system. Many types of Backflow preventers also have test ports so that they can be tested and examined on a regular basis to evaluate whether they are functioning properly.

This topic describes how to track Backflow prevention devices and their testing.

Backflow Testing Process Overview

Each of the steps outlined below are explained in greater detail on the following pages.

1. Create the Backflow devices during Backflow Inventory Maintenance and maintain the following fields:
   - Installed Date
   - Test Frequency
2. Assign the Backflow devices to a service connection using the Create Service Connection Wizard.
3. Create the Backflow Testing Workfile.
   Tip: The Backflow device's Installed Date and the Test Frequency work together to determine if the Backflow device is due to be tested.
4. Print and review the list of Backflow devices to be tested.
5. Print the Backflow Testing Notices and/or print the certified mailers for mailing to the appropriate customers.
6. After Backflow tests have been performed, use Backflow Workfile Maintenance to update the Backflow testing transaction with the test date and test status.
7. Run the Backflow Testing Post to update the Backflow device with the Test Date, Test Status and add testing detail to the history.

Backflow Inventory Maintenance

Use Backflow Inventory Maintenance to maintain information about the Backflow devices used by your facility.

A. Click **Daily Work** from the Menu Bar.

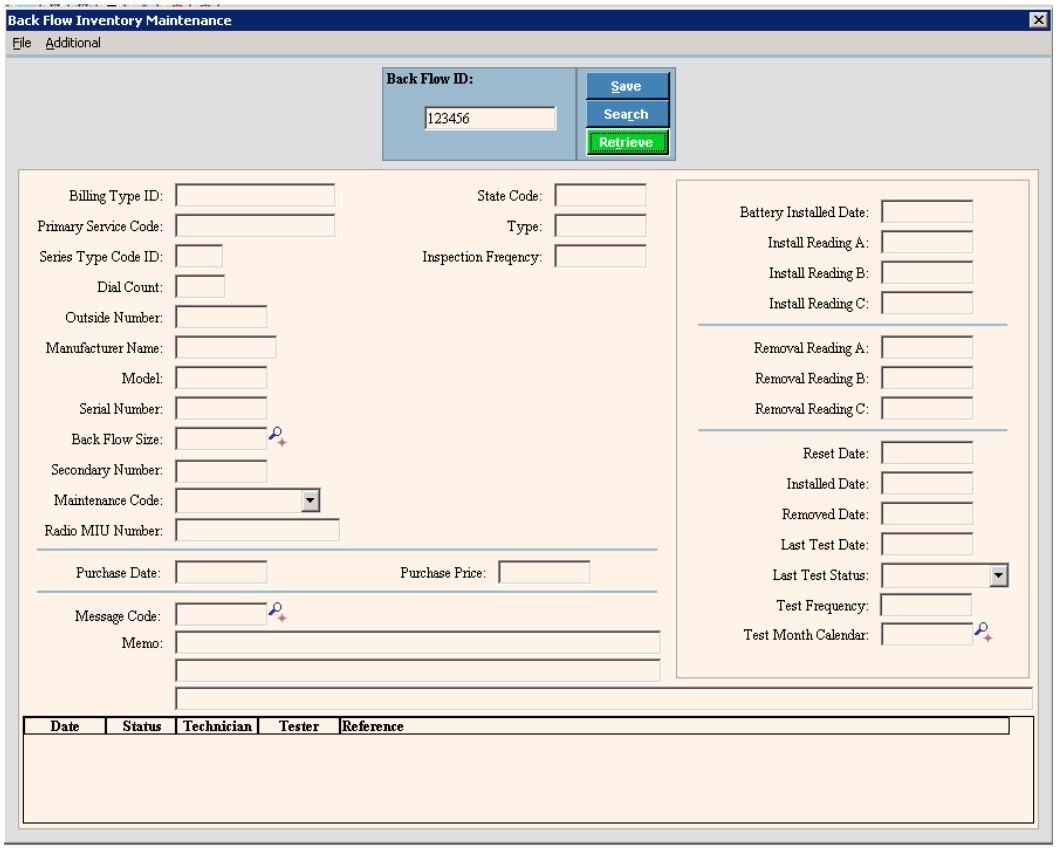
B. Click **File Maintenance**.

C. Click **Code Maintenance**.

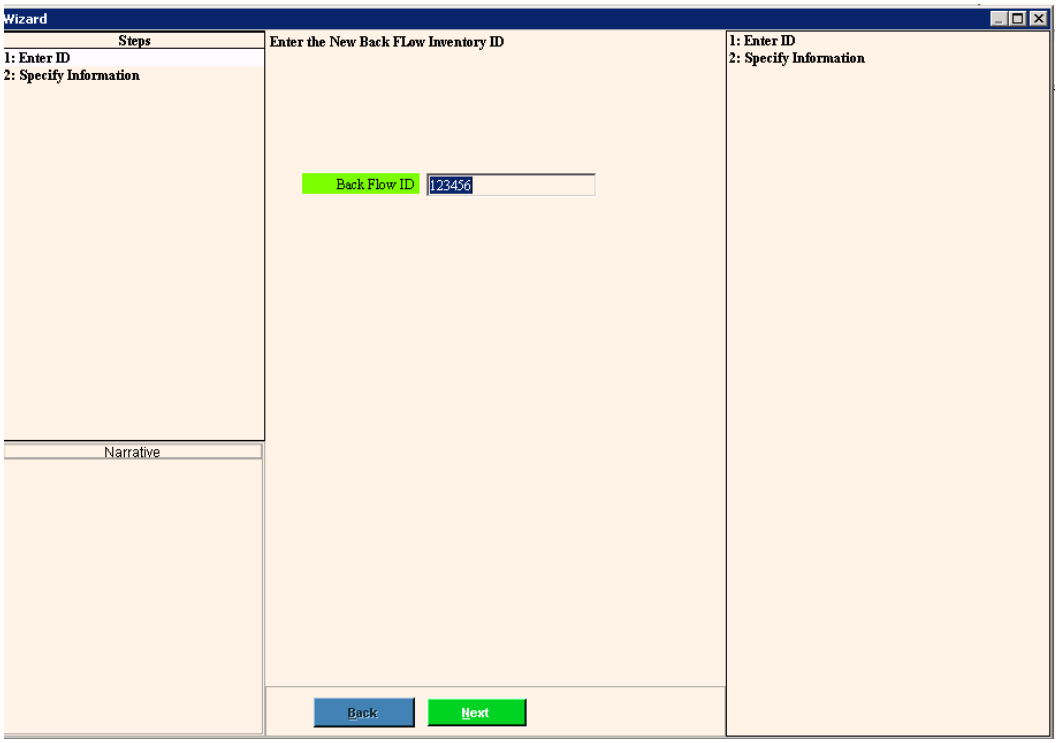
D. Click **Backflow File Maintenance**.

E. Click **Backflow Inventory Maintenance**

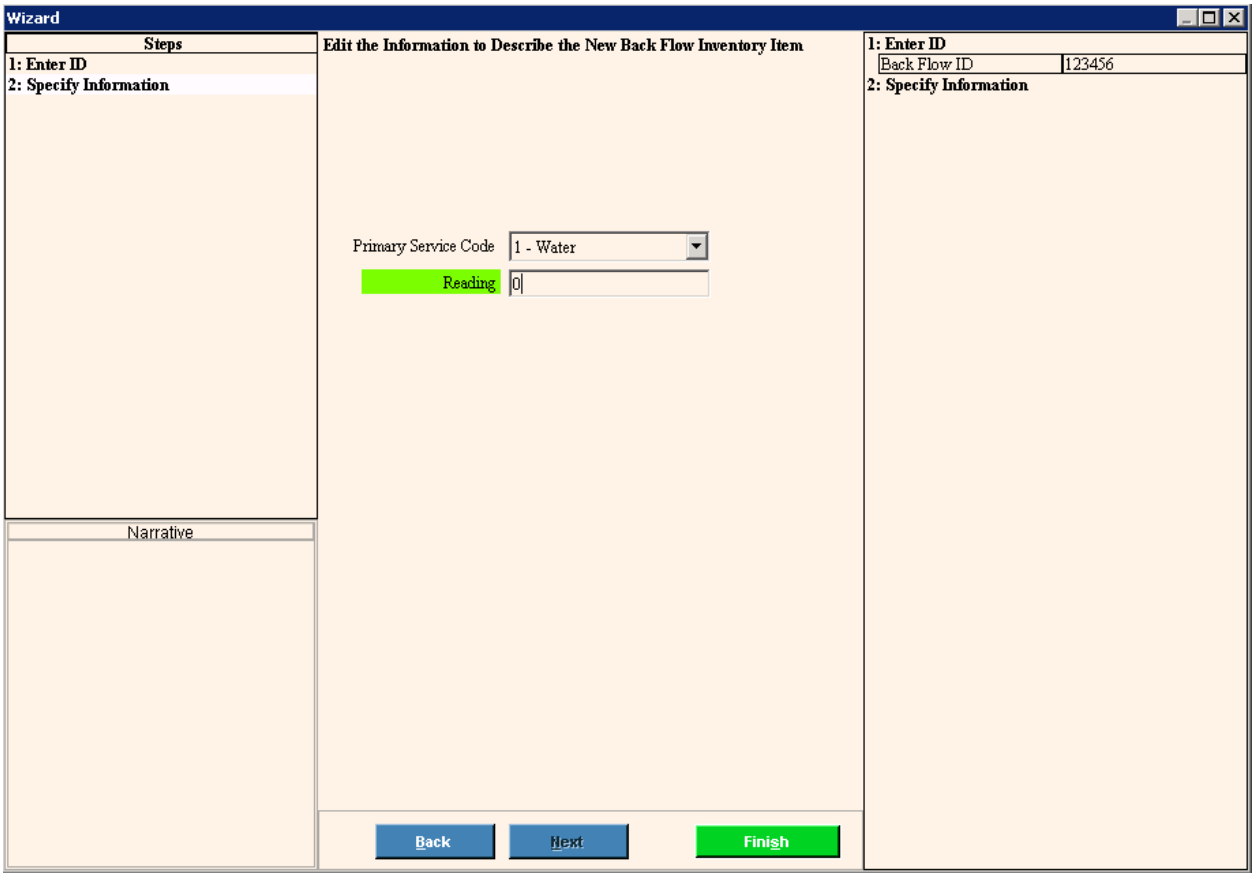
Enter the Backflow ID and press **[Enter].**



The new Backflow Wizard displays.



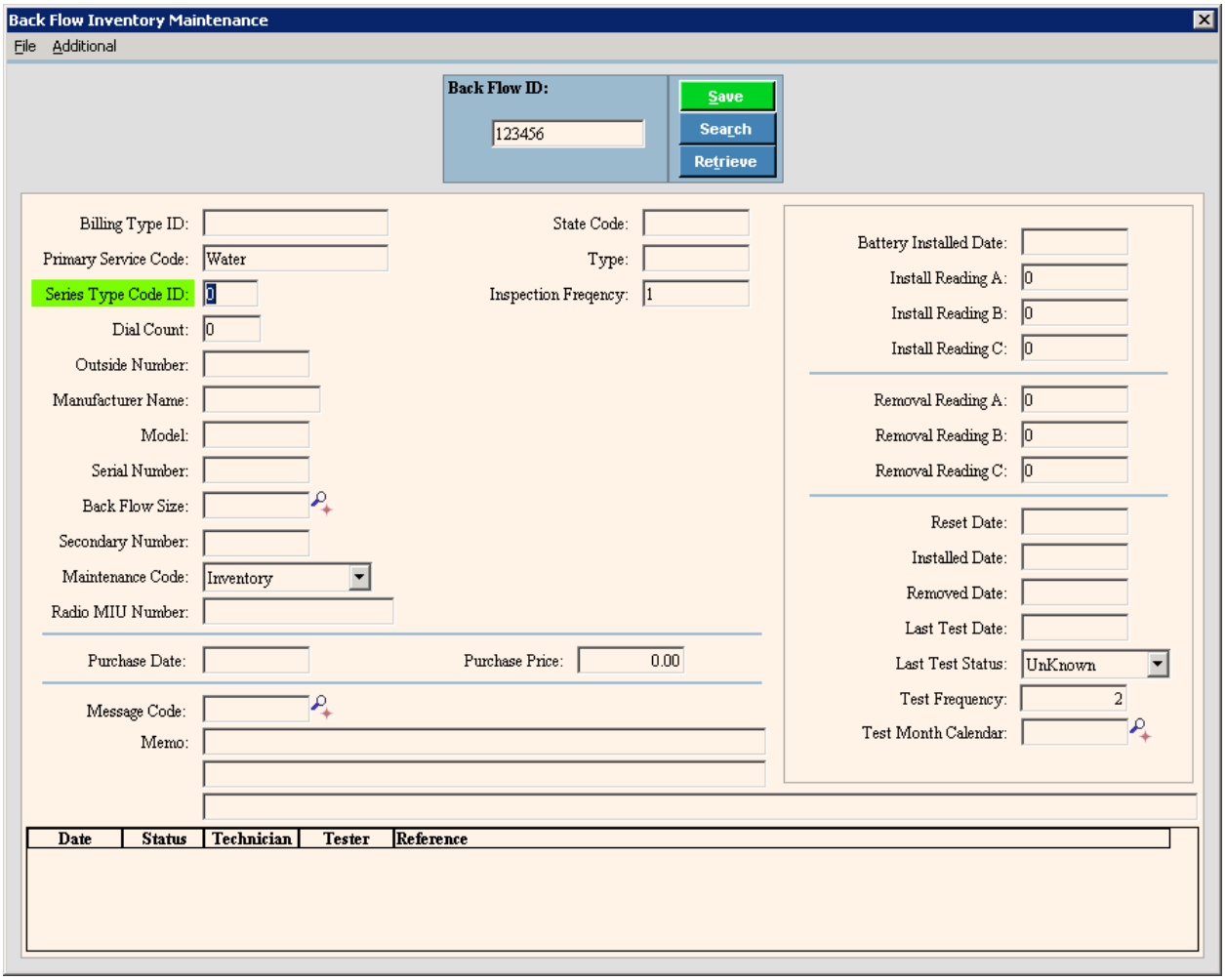
To confirm the Backflow ID, click **Next** and the next window of the Backflow Wizard displays.



Enter the following:

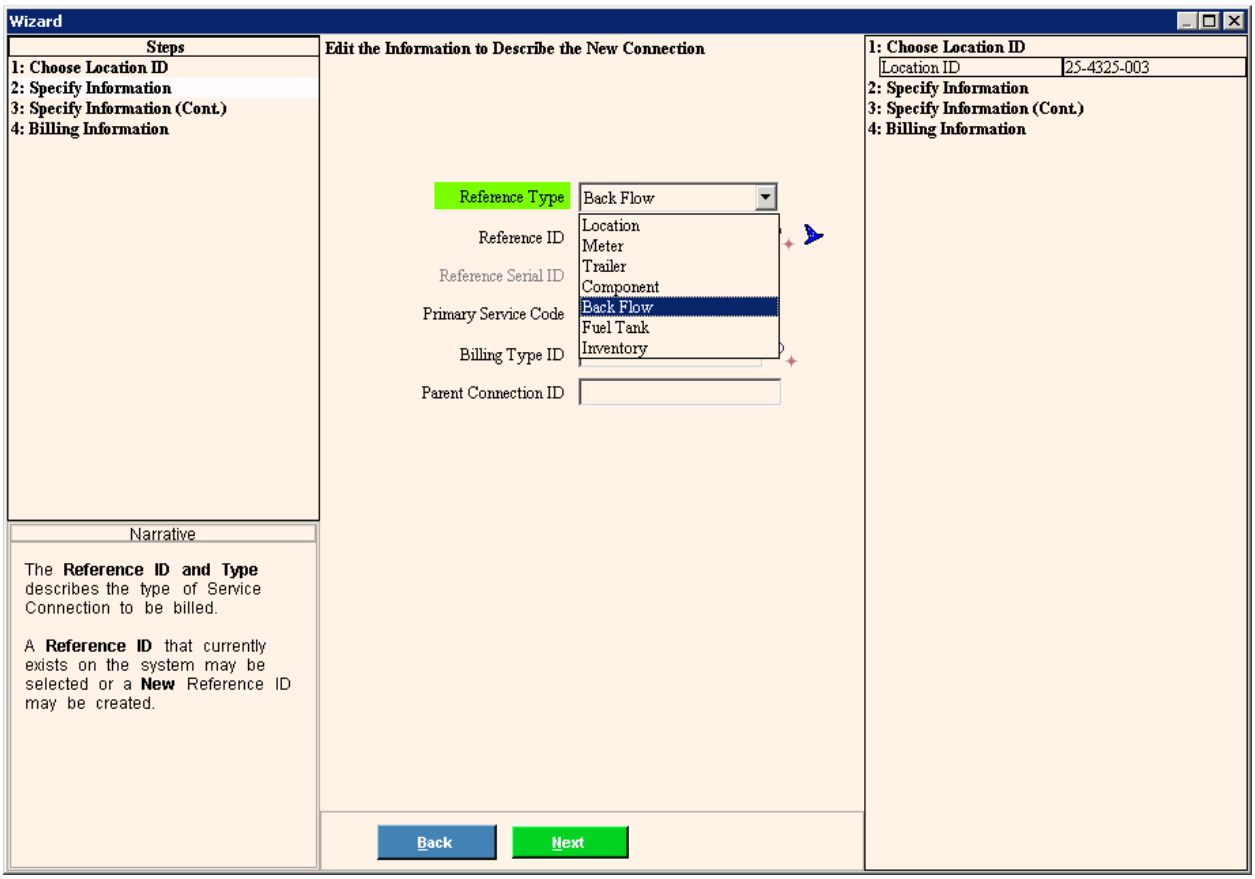
Backflow Inventory Wizard Prompts	
Primary Service Code	To select the primary service code for the Backflow device, click a choice in the drop-down list. (2.0 numeric)
Reading	Enter the present reading for the Backflow device, if applicable. (10.0 numeric)
Finish	To update the new or changed information, click **Finish** or press **[ENTER]**. Keyboard shortcut: **[ALT + s]** **CAUTION** **To avoid losing data, you must click Finish.**

After you click **Finish**, the Backflow Wizard closes and the Backflow Inventory Maintenance window displays for entry of the remaining fields. For Questions on the field descriptions, please refer to the Edifice WebHelp.



Assign the Backflow Devices to a Service Connection

Assign the Backflow devices to a service connection using the Create Service Connection Wizard.



Backflow Inventory Wizard Prompts	
Reference Type	To specify that this is a Backflow device, click to select **Backflow** from the drop-down list.

Create the Backflow Testing Workfile

Use the Backflow Testing Create Workfile routine to create a workfile of Backflow prevention devices to be tested to ensure they are working properly. This process will pull in devices due to be tested based on the Installed date or the Last Test date and Test Frequency.

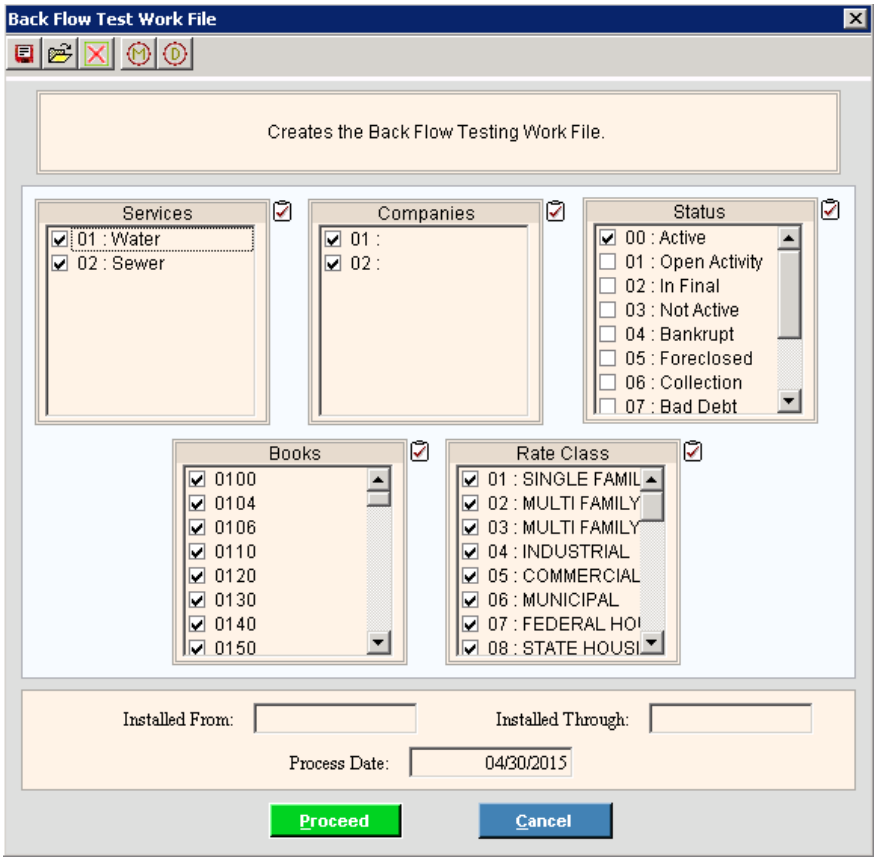
Tips:

- The Backflow device's Last Test Date and the Test Frequency work together to determine if the Backflow device is due to be tested.
- Before creating the Backflow Testing Workfile, you may view a list of customers and locations with Backflow devices due to be tested by running the iKnowSys report *Backflow Devices to be Tested*.

A. Click **Processes** from the Menu Bar.

B. Click **Backflow Testing**.

C. Click **Create Workfile**.

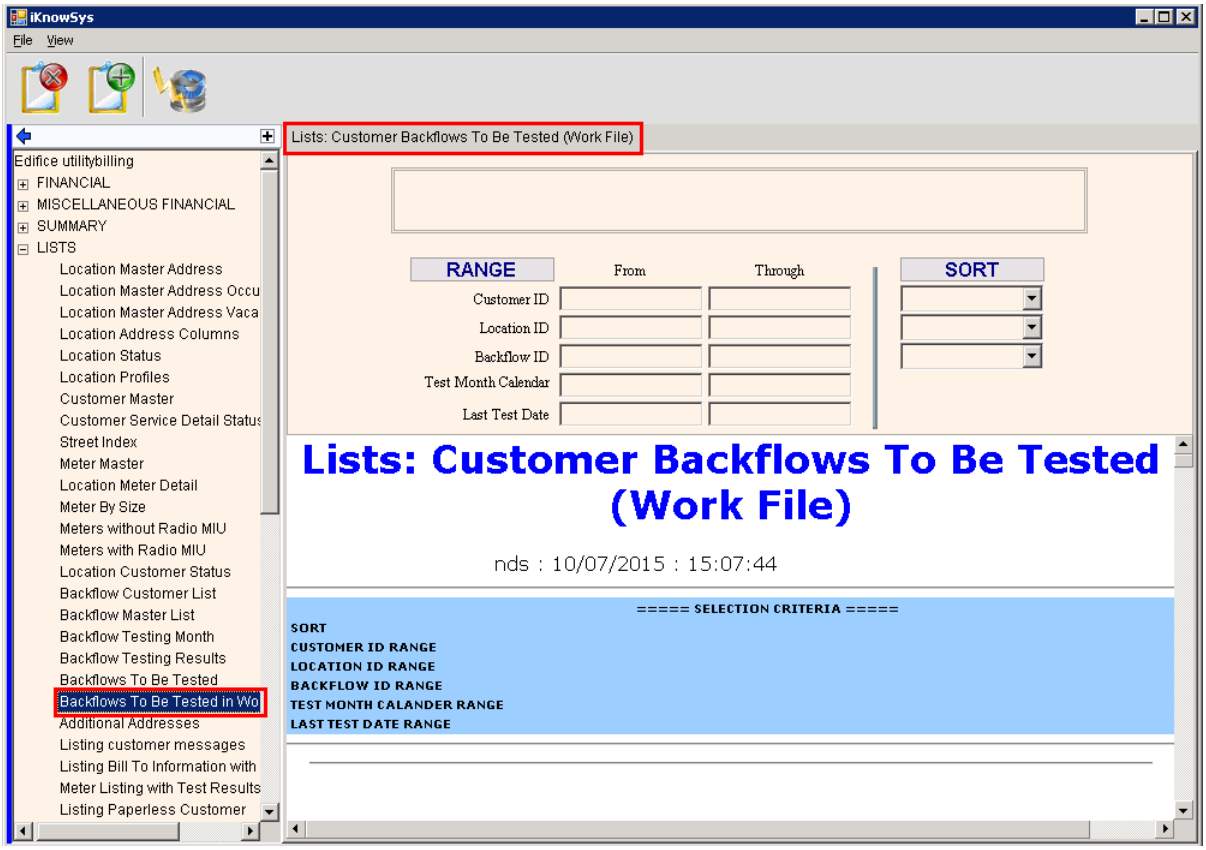


Backflow Testing Create Workfile Prompts	
Services	To select the services to consider, click to check the appropriate services listed. **Tip:** To quickly select or de-select services listed, click **Check All** .
Companies	To select the companies to consider, click to check the appropriate companies listed.
Status	To select the statuses to consider, click to check the appropriate statuses listed.
Books	To select the books to consider, click to check the appropriate books listed.
Rate Class	To select the rate classes to consider, click to check the appropriate rate classes listed.
Installed Date From	To limit the Backflow devices being tested to a specific range of installed dates, enter the beginning Install Date in the range. (mm/dd/ccyy, *slashes and century are optional*) **Tip:** To include all dates, leave blank.
Installed Date Through	To limit the Backflow devices being tested to a range of dates, enter the ending Install Date in the range. (mm/dd/ccyy, *slashes and century are optional*) **Tip:** To include all dates, leave blank.
Process Date	To accept the default Process Date, press **[TAB]** or enter another date as the Process Date. (mm/dd/ccyy, *slashes and century optional*)
	To run the routine and generate the report, click **Proceed** or press **[ENTER]**. **Keyboard shortcut**: **[ALT + p]**
	To escape from the routine, click **Cancel**. Keyboard shortcut: **[ALT + c]**
Status	Displays information pertaining to the various phases of the Create Workfile process to guide you. **Note:** The status displays **Complete** when the process is ended. In addition, the Message window displays **Process Ended** and **100%** to alert you when the routine is complete.
	To close the Backflow Testing Create Workfile program when **Complete** displays and the routine is finished, click **Close** .

Print and Review the List of Backflow Devices to be Tested in Workfile

Use the iKnowSys report **Backflows to be Tested in Workfile List** to generate a list of Backflow devices in the Backflow Workfile that are due to be tested.

Note: If the iKnowSys Reporting module is not activated, use the Search function in Backflow Workfile Maintenance to generate a simple list of customers with Backflow devices to be tested. From Backflow Workfile Maintenance, click **Search**. From the Search window, click **File → Print** to generate the list.



Location ID	000000400765	**Customer ID**	000000000003	**First**	RICHARD		**Last**	SMITH	
Backflow ID	2433941	**Backflow Size**	34	**Street Number**	120		**Street Name**	COMMERCIAL ST	
Manufacturer	WILK	**Model**	975X	**Serial Number**	2433941		**Testing Frequency**	2	
Last Test Date	2012-01-06	**Last Test Status**	Good	**Secondary Number**			**Installed Date**		
Memo 1	NEW BUILDING	**Memo 2**	RPZ-REDUCED PRESSURE	**Memo3**			**Test Month Calendar ID**	2-1	
Location ID	000009999999	**Customer ID**	000000000061	**First**	JOHN		**Last**	JONES	
Backflow ID	BA9697	**Backflow Size**	2	**Street Number**	184		**Street Name**		
Manufacturer	FEBO	**Model**	825	**Serial Number**	BA9697		**Testing Frequency**	2	
Last Test Date	2012-01-03	**Last Test Status**	Good	**Secondary Number**			**Installed Date**		
Memo 1	NEW BUILDING	**Memo 2**	RPZ-REDUCED PRESSURE	**Memo3**			**Test Month Calendar ID**	2-1	

Print the Backflow Testing Notices & Mailers

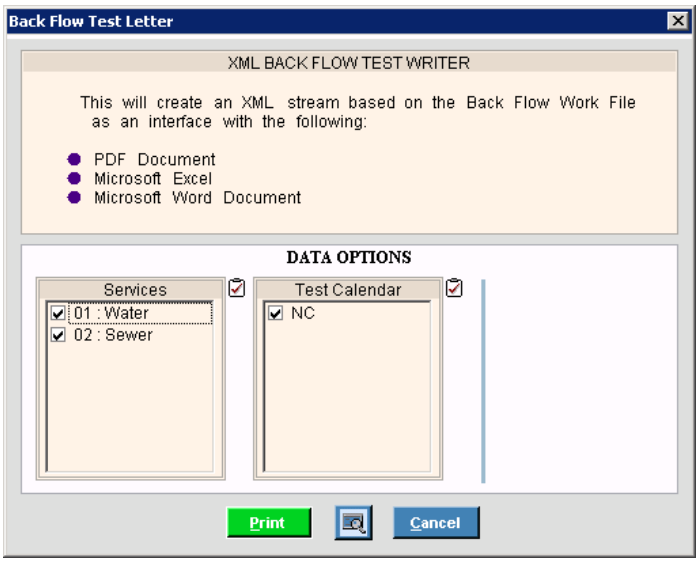
If needed, use the XML Testing Notice Letter to print Backflow Testing Notices and/or print the certified mailers for mailing to the appropriate customers.

Note: Please contact NDS Support if this letter needs to be set up.

A. Click **Processes** from the Menu Bar.

B. Click **Backflow Testing**.

C. Click **XML Testing Notice Letter**.



Backflow XML Testing Notice Letters Prompts	
Services	To select the services to print, click to check the appropriate services listed. **Tip:** To quickly select or de-select *all* services listed, click **Check All**. **Note:** The Roll Parameter record can limit the services that print.
Test Calendar	To select the test calendars, click to check the appropriate calendars listed.
Print	To begin printing click **Print**, or press **[ENTER]**. Keyboard shortcut: **[ALT + p]** **Important:** Be sure to select the printer (job site file) that is set up for printing the roll notices.
	To print to the Print View screen, click here.
Cancel	To escape from the print routine, click **Cancel**. Keyboard shortcut: **[ALT + c]**

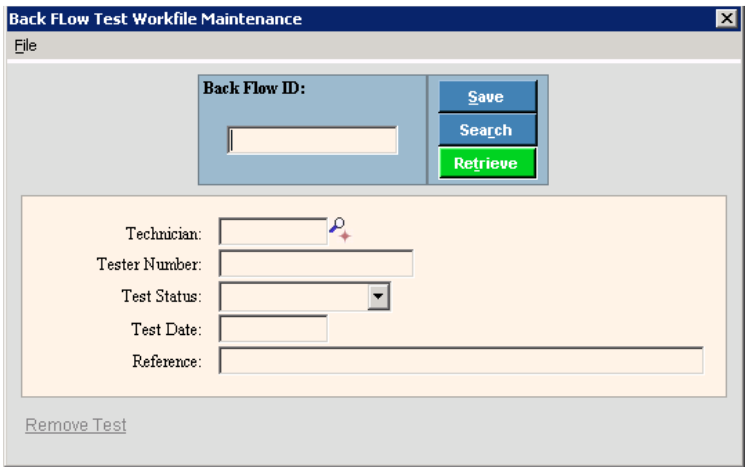
Maintain Backflow Test Dates and Statuses

After Backflow tests have been performed, use Backflow Workfile Maintenance to update the Backflow testing transactions with the test date and test status.

A. Click **Processes** from the Menu Bar.

B. Click **Backflow Testing**.

C. Click **Workfile Maintenance**.



Backflow Testing Workfile Maintenance Prompts	
Backflow ID	Enter the identification for the Backflow device and then press **[Enter]**. (up to 17 characters)
Save	To update the new or changed information, click **Save** or press **[ENTER]**. **CAUTION** **To avoid losing data, you must save new or changed records.**
Search	To view all of the existing Backflow test records, click **Search**. From the Search list you can select the record to change or delete.
Technician	Enter the Code for the technician who performs the Backflow test. (up to 7 characters)
Tester Number	Enter the informational tester number, if applicable. (up to 10 characters)
Test Status	To assign the test status, click a choice in the drop-down list.
Test Date	Enter the date the Backflow test is performed. (mmddccyy, *slashes and century optional*)
Reference	Enter a reference for the Backflow test, if applicable. (up to 60 characters)

Perform Backflow Testing Post

Run the Backflow Testing Post to update the Backflow device with the Test Date and Test Status, and to add testing detail to the history.

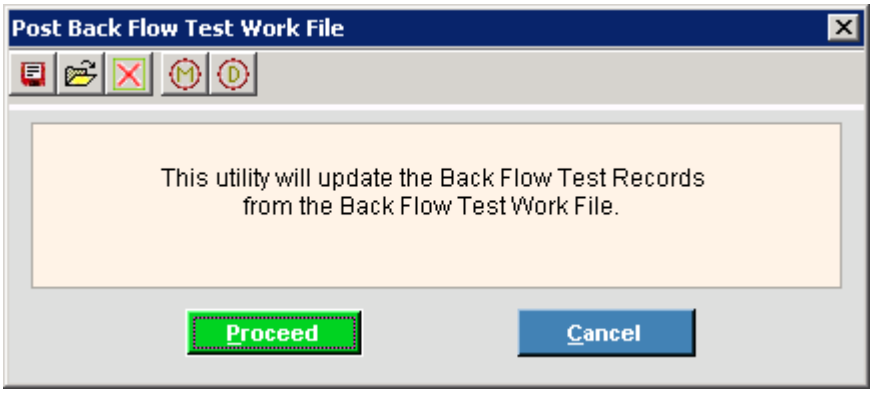
Notes:

- Prior to beginning the Post routine make sure you have updated the Backflow records in Backflow Workfile Maintenance with the test date and test status.
- The Backflow Testing Post performs the following functions:
  - For each Backflow device that was tested, the Backflow device Test Date and the Test Status is updated.
  - Generates the Backflow testing history records.
- You can view the updated Backflow device in the Service Connections Area of the Customer Inquiry.

A. Click **Processes** from the Menu Bar.

B. Click **Backflow Testing**.

C. Click **Post**.



Click **Proceed** to run Backflow Testing Post.