

AQUA SOLUTIONS CONSULTING, LLC

CCCPH: Backflow Assessment

Field User Manual

Step-by-step procedure for conducting and documenting
cross-connection control hazard assessments

Version 1.3.0 (build 28) · iOS · September 2026
Aqua Solutions Consulting, LLC · aquasolutionsconsulting.com

Contents

1. Before You Start

The app stores everything on the device. There is no cloud sync and no account to log into. Anything you have not exported exists only on that iPhone or iPad, so back up regularly (Section 9).

Item	What it means
Subscription	CCCPH Pro Access is required to use the app. A paywall appears at launch until an active subscription is detected.
Location	Allow location access when prompted. GPS is captured automatically when each assessment is created and appears on the PDF.
Camera	Allow camera access to attach site photos to a form.
Storage	All records live in local device storage. Deleting the app deletes your data.

Do this first: Complete Settings (Section 2) before you create any assessments. HA-1 pulls your specialist and company information from Settings at the moment an assessment is created. Assessments started while Settings is empty will show a blank HA-1.

2. One-Time Setup — Settings

Open the Settings tab. Complete all three sections, then return to the dashboard. You only do this once per device.

2.1 Specialist defaults

These fields populate the specialist block on every HA form and PDF you produce.

Field	Enter
Specialist Name	Your full name as it should appear on regulatory submittals
Credential #	Your CCCS number (for example, CCCS #2983)
Credential Expiration	Expiration date on the credential
D-Number / License	Distribution or treatment certificate number, if applicable
Specialist Phone	Contact number for the utility and customer
Specialist Email	Contact email
Specialist Signature	Sign with your finger in the signature box. This signature is applied to exported PDFs.

2.2 Company branding

Company Name, Organization / Firm, Phone, and Website appear in the header of exported documents. Enter them exactly as they should read on a document going to a water system or to DDW.

2.3 Data management

Three controls live at the bottom of Settings. Know what each one does before you tap it.

Control	Effect
Export all data (JSON)	Writes a complete backup of every system and assessment. This is your safety net — see Section 9.
Import data	Restores a JSON backup. Use it to move data to a new device.
Clear all local data	Erases every system and assessment on the device. Permanent. Export a backup first.

Caution: Clear all local data cannot be undone and there is no cloud copy to recover from. Never tap it without a current JSON export saved off the device.

3. Create the Water System (HA-1)

Every assessment belongs to a water system. Create the system once, then all of its connections reference it.

1. **Tap + New System on the dashboard.**

The HA-1 form opens: General System Information and Limited Access Notation.

2. **Enter the system identifiers.**

System Name (for example, Cedarpines Park Mutual Water Company), PWSID (for example, CA3610011), County, City / State, and System Type.

3. **Enter Total Service Connections.**

Use the utility's current connection count. This figure appears on the summary PDF.

4. **Complete the distribution system conditions.**

Known low-pressure areas or dead ends, history of main breaks, pressure zone complexity, hydraulic gradient concerns, and high-demand events affecting system pressure. These support your hazard determinations later.

5. **Complete the Limited Access Notation section, if applicable.**

Record access restriction type and description, the connection IDs affected, the access coordinator name and phone, and dates of access attempts. Document refusals when they happen — reconstructing them later is unreliable.

6. **Tap Create System.**

The system becomes the active system and the dashboard now shows its assessments.

To revise HA-1 later: Tap Edit HA-1 from the dashboard. Changes flow through to subsequent exports.

4. Load the Connection Register (Optional but Recommended)

The Connection Register loads the utility's entire connection list into the app so every field visit starts from a verified record instead of hand-typed data. On a system the size of Cedarpines Park this removes hundreds of manual entries and prevents address and account-number transcription errors.

4.1 Prepare the CSV

Export the utility's connection list from their billing or meter-reading system, or use your own route workbook, and save it as CSV — not .xlsx. In Excel: File > Save As > CSV UTF-8.

Column	Required?	Notes
Address	Required	Service address. Rows without an address are skipped.
Account or Meter	Required	Account or meter number. Duplicates are allowed and retained.
Stop	Optional	Route sequence number. Controls the order connections appear in.

Column	Required?	Notes
Zone	Optional	Route zone or book. Shown on each row.
Name	Optional	Customer or owner name. Stored, not printed on the HA form.
Service Type	Optional	Used to pre-select the form type and fill Service Type.
Line Size	Optional	Fills the Line Size field on the form.

Column headings are matched automatically, so common variations such as Acct #, Full Address, or Meter No. are recognized.

4.2 Import it

1. Get the CSV onto the device.

AirDrop it from the Mac, then save it to Files > On My iPhone. Files stored only in iCloud may not open reliably in the field.

2. Select the correct water system, then tap Register on the dashboard.

The register always applies to the active system.

3. Tap Import CSV and choose the file.

Confirm the count when prompted.

4. Review the summary line.

It reads, for example: 746 connections · 12 complete · 3 in progress · 731 not started. Any assessments you had already completed are matched to their register rows automatically by address, or by account plus street number.

If the file picker will not open the CSV: Use Paste CSV instead. Open the CSV on your computer, select all, copy, and paste it into the box. The result is identical.

4.3 Working the register in the field

- Connections are listed in route order, so you work top to bottom.
- Search by address, account number, or customer name.
- Filter by Not started, In progress, or Complete to see what is left.
- Each row shows its status, so you always know where you stopped.

Replacing a register: Importing a second CSV for the same system replaces that system's register after you confirm. Your assessments are never affected — only the connection list is replaced.

5. Conduct an Assessment

5.1 Start the form

From the register (recommended): find the connection, confirm or change the form type in the dropdown, and tap Start. The address, account/meter number, service type, line size, today's date, and GPS are filled automatically, and HA-1 system information carries over.

Without a register: tap + New Assessment on the dashboard and choose the form type. You enter the address and account number by hand.

5.2 Choose the correct form

Form	Connection type	Use when
HA-2	Residential	Single-family homes; the bulk of most systems
HA-3	Commercial / Industrial	Businesses, industrial premises, institutional facilities
HA-4	Irrigation	Dedicated irrigation services and injector-equipped systems
HA-5	Fire Protection	Fire sprinkler and suppression services
HA-6	Auxiliary Supply	Wells, recycled water, or any dual supply on the premises
HA-7	Multi-Family	Apartments, condominiums, shared-service properties
HA-8	Healthcare / High-Hazard	Medical, dental, dialysis, laboratory, mortuary

Auxiliary supply found on site: If you discover a well, recycled water, or another auxiliary supply during a residential visit, complete an HA-6 for that connection in addition to the HA-2. An auxiliary supply is a high-hazard condition regardless of the connection's primary classification.

5.3 Complete the form

1. Verify the identification block.

Confirm the pre-filled address and account number against what you see at the meter. Correct them on the form if the utility's record is wrong, and tell the utility.

2. Record the assembly, if one is present.

Assembly Present, Assembly Type, Assembly Size, Manufacturer, Model, Serial Number, Last Test Date, and Last Test Result.

3. Answer every hazard question.

Answer each question explicitly, including the ones that are No. A blank answer reads as unassessed, not as absent, and blank checklist items have had to be corrected retroactively on past projects.

4. Set the Hazard Classification and Required Protection.

Base the required protection on the hazard you documented, not on what happens to be installed.

5. Record any deficiency.

Mark Deficiency Noted and describe it plainly: what you observed, where, and what protection is required to correct it.

6. Attach photos.

Up to six per form. Photograph the meter and service connection, any assembly and its tag, and every deficiency. Photos are embedded in the exported PDF.

7. Add observations and notes.

Anything the checklist does not cover — access conditions, occupant statements, follow-up needed.

Entries save as you work. Return to the dashboard when the visit is finished; the assessment stays In progress until you mark it complete.

5.4 When no one is home

Do not leave the record empty. Create the assessment, note the date and time of the attempt, photograph the meter and any visible exterior conditions, and record the attempt in the HA-1 Limited Access Notation section. Two or three documented attempts plus a written notice is the defensible position when a utility reports its survey completion to DDW.

6. Review and Export

Open the Export tab, confirm the active system, and choose the output that matches what you need to deliver.

Export	Contents and use
Full package PDF	Every completed form for the system, including HA-1, photos, and signature. This is the deliverable for a completed survey.
Combined PDF	The selected assessments in one document. Use for partial deliveries or a single route zone.
Summary PDF	One-page overview: connection counts, hazard classifications, and deficiencies. Use for the board or the utility manager.
Letter PDF	Customer notification letter for a connection with a deficiency requiring correction.
Export CSV	Tabular data for a spreadsheet — tracking, invoicing, or the utility's own records.

6.1 Check before you deliver

- The HA-1 block is populated on every form, not just the first.
- Your signature and credential number appear.
- Photos are present and legible.
- Hazard classification and required protection are stated on every assessment.
- No form is missing an answer that should read No.

6.2 Register status export

From inside the Register, Export status produces a CSV of every connection with its status, hazard classification, required protection, and last-updated date. This is the progress report for the utility, and the tracking sheet for a multi-week survey.

7. Recommended Field Workflow

A repeatable sequence for a multi-day survey.

Stage	Action	Notes
Before	Complete Settings	Once per device
Before	Create the water system (HA-1)	Once per utility
Before	Import the connection register	Once per utility; re-import only to replace
Daily	Filter the register to Not started	Work in route order

Stage	Action	Notes
On site	Start from the register row	Identification and GPS fill automatically
On site	Complete the form and attach photos	Answer every question, including No
End of day	Export status CSV	Progress record and daily backup of status
Weekly	Export all data (JSON)	Full backup off the device
At completion	Export full package PDF	Deliverable to the utility

8. Troubleshooting

Symptom	Resolution
HA-1 is blank on a form	Settings were empty when that assessment was created. Complete Settings, then start a new assessment for that connection. Existing blank records may need to be redone.
Files are greyed out in the picker	Save the CSV to Files > On My iPhone rather than iCloud Drive, or use Paste CSV instead.
Import reports no header row found	The file needs an address column and an account or meter column. Confirm it saved as CSV, not .xlsx.
Register is empty after switching systems	The register is per water system. Select the correct system, then reopen Register.
No GPS on the PDF	Location permission was denied, or the assessment was created indoors without a fix. Check Settings > Privacy > Location Services for the app.
Assessments missing after an app update	Check that the correct water system is selected. If data is genuinely gone, restore the most recent JSON backup via Import data.

9. Data Protection

There is no cloud backup. A lost or wiped device means lost assessments, so treat the export routine as part of the job, not an afterthought.

- Run Export all data (JSON) at the end of each field day and save it off the device.
- Keep the JSON backups in a dated folder — a wrong entry is recoverable from an earlier file.
- Export the full package PDF at each milestone, not only at project completion.
- Never tap Clear all local data without a verified current backup.

Moving to a new device: Export all data (JSON) on the old device, transfer the file, install the app on the new device, complete Settings, then use Import data. Verify your assessment count matches before wiping the old device.

10. Support

Aqua Solutions Consulting, LLC

Thealy@aquasolutionsconsulting.com

aquasolutionsconsulting.com

When reporting an issue, include the app version shown in Settings, the device and iOS version, the water system involved, and what you did immediately before the problem appeared.