MassDEP LCCA Assistance Program

Lead & Copper in Schools Reporting Tool

User's Guide

Rev. 9/29/2016

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Important Concepts to Keep in Mind

- **Do not use the browser's back button for navigation.** Doing so will exit you from the application.

- **Sample Result data is loaded into the tool once per day**. This means that sampling results are not immediately available within the tool. No data is loaded over the weekend.

- **It is important to maintain up-to-date contact information** (for both the account and facilities) in the tool for MassDEP to contact you. See the section Contact Information for how to update your contact information.

- Depending on the server load and the amount of information associated with your account, it may take some time to log in. Please be patient.

Formatting Used in This Guide

- Any text that appears as `Example` in this guide represents a button the online tool interface. The text color coincides with the color of the button in the tool.

- Any text that appears as ***`Example`*** in this guide represents a form field in the online tool interface.

- Any text that appears as **`Example`** in this guide represents the title of a modal, i.e., popup box, or section header in the online tool interface.

Useful Links

- You can find the link to the tool, this guide, and other materials related to the Assistance Program on the MassDEP website at http://www.mass.gov/eea/agencies/massdep/water/drinking/testing-assistance-for-lead-in-school-drinking-water.html, under **Materials for the Assistance Program for Lead in School Drinking Water**.

- You can find your school's unique DOE ID # at Massachusetts Department of Elementary and Secondary Education School and District Profiles (http://profiles.doe.mass.edu/).

Requirements

- A desktop browser such as the most recent versions of Google Chrome or Mozilla Firefox, with Javascript enabled.

- The tool has been tested to work with the following desktop browsers:
    - Google Chrome v.50
    - Mozilla Firefox v.47
    - Microsoft Internet Explorer v.10 (you will not be able to print pdf documents due to a rendering issue)

- Note, the tool is currently **NOT** compatible with the iPhone or iPad due to an iOS rendering issue.

Logging In & Initial Set Up

1. Go to https://script.google.com/a/macros/madwpdep.org/s/AKfycbxP99K-Cd5B3ioE7nswn0peOEndcGrXwVk6zJcS5iHxzGO55B1k/exec using one of the browsers listed in the Requirements section above.

2. Enter the 12 digit PIN number that was provided to you by either the Technical Assitance Provider or via email from MassDEP Drinking Water Program.

3. IMPORTANT! Click the user icon in the top-right corner (located next to the Exit button) and enter the primary point of contact's contact information including first name, last name, email, phone, etc. This is very important. **MassDEP will use this information to send you notifications and other timely correspondence. Keep this information up to date!**

Navigation & General Tasks

See Figure 1 for an overview of navigating the user interface.

Add a Facility (School or Child Care Facility)

1. From the main screen, click the button labeled `Add School or EEC Facility`. You will be presented with a popup box of the same name.
2. Select the ***Facility Type***. Choices are ***School*** or ***Child Care Facility***.
3. The ***Town*** list will load with a choice of towns. Select the town in which the facility is located.
4. ***Facility Name*** will populate with only facilities that match the ***Facility Type*** and ***Town*** selected. Select from the list of facilities. If the facility you are looking for is not listed, please follow the steps outlined in **Notify MassDEP of a Missing Facility** below.
5. Click the button labeled `Add Selected Facility` to add the facility to your list of facilities.

Delete a Facility (School or Child Care Facility)

1. From the main screen, click on the button labeled `DELETE FACILITY`.
2. A popup box titled **Confirmation** will appear asking you to confirm.
3. Click on the button labeled `Delete Facility` to delete the facility from your list of facilities. **Deleting a facility is permanent. You will not be able to recover data associated with a facility you delete from your account.**

Notifiy MassDEP of a Missing Facility

1. Click on the button labeled `Add School or EEC Facility`. You will be presented with a popup box of the same name.
2. From the footer of the popup box, click on the button labeled `Can't find your facility`?
3. Another popup box will appear titled **Facility Inquiry**.
4. Select the ***Facility Type***, enter the ***Town*** in which the facility is located, the ***Facility Name***, ***Org Code***, and any other ***Additional Information*** about the facility. ***Org Code*** is a unique identifier assigned by either the Massachusetts Dept. of Education (for schools) or the Massachusetts Dept. of Early Education and Care (for early education and child care facilities).
5. Click on the button labeled `Submit`. This will send an email to MassDEP Drinking Water Program. MassDEP staff will contact you regarding the inquiry. **Note, it is important to maintain up-to-date contact information (for both the account and facilities) in the tool for MassDEP to contact**

you. See the section Contact Information for how to update your contact information.

Contact Information

It is extremely important to maintain updated contact information for the primary point of contact, i.e. account contact, and the facility contact. **The information you keep updated in the tool is how MassDEP will contact you through email, mail, and phone. It is important that you keep this information current.**

There are two types of contacts.

1. **Primary Point of Contact (Account Level Contact)**
   The Primary Point of Contact is the contact person for the account. If your account contains more than one facility, the primary point of contact will usually be the superintendent or other school district level employee.

2. **Facility Primary Contact**
   The Facility Primary Contact is the contact person for a given facility. This will usually be the person responsible for collecting and logging drinking water samples at each school facility (this may or may not be the same person for all school facilities).

Add/Edit the Primary Contact for the Account

1. Click on the **`User`** icon located in the top right corner of the screen, next to the `Exit` button.
2. A popup box titled **`Edit Primary Contact`** will appear.
3. Fill in the requested information.
4. Click the button labeled `Update`.

Add/Edit the Primary Contact for the Facility

1. Click on the facility for which you want to add/edit contact information.
2. Click on the **`User`** icon located below the facility's name in the details window.
3. A popup box titled **`Edit Primary Contact`** will appear.
4. Fill in the requested information.
5. Click the button labeled `Update`.

Notifications Tab

The Notifications tab lists all sample results that require further reportable actions by you. For the most part these will include Lead and Copper sample result above the Action Level. The Action Level for Lead is 0.015 mg/l; The Action Level for Copper is 1.3 mg/l. Clicking on the button labeled `View Sample Results` will open a popup box titled **Edit Actions Taken** with details about the sample result and the ability to report any actions taken.

Note, it is important to maintain up-to-date contact information (for both the account and facilities) in the tool for MassDEP to contact you. See the section Contact Information for how to update your contact information.

Sample Locations Tab

The Sample Locations tab lists the sample locations for the facility. From this tab you can add, modify, delete sample locations, view sampling results by sample location, and report actions taken in the event of a sampling result above the Action Level.

Add a Sample Location

Sample Location ID is automatically assigned sequentially beginning with 001. Each sample location ID is suffixed with "P" or "F". The "P" location suffix identifies the primary sample while the "F" location suffix identifies a flush sample.

1. Click on the button labeled `Add New Sample Location`.
2. A popup box titled **`Add New Sample Location`** will appear.
3. The fields ***`Facility`*** and ***`Location ID`*** are pre-populated and disabled. ***`Location ID`*** is calculated by incrementing the last ***`Location ID`***. For example, if you have the following sample location IDs:
    - 001P/F
    - 002P/F
    - 005P/F

    the next calculated sample location ID will be 006P/F. If you need to skip a number in the sample location ID sequence, create the sample location for the ID that will be discarded and then create another sample location. Refer to Delete a Sample Location for instructions on how to delete the unused sample location ID. Note, each sample location you create will generate a "P" and "F" location code suffix. The "P" location code suffix identifies the primary sample while the "F" location suffix identifies a flush sample.

4. Select the proper ***`Location Type`***.
5. Enter a ***`Location Description`*** for the sample location. Although a description is useful, and recommended, the field can be used in other ways. For instance, if you have an existing coding system that does not follow the MassDEP coding convention you can use the ***`Location Description`*** to act as a crosswalk for your sample location coding schema.
6. Click the button labeled `Add Location`. The sample location is added to your list of sample locations.

Edit an Existing Sample Location

1. Click the button labeled `Edit Location` for the sample location you want to modify.
2. A popup box titled **`Edit Sample Location`** will appear.
3. The only fields that can be modified are ***`Location Type`*** and ***`Location Description`***.
4. Modify the information as desired.
5. Click the button labeled `Update`.

Delete a Sample Location

A sample location should only be deleted if it was entered in error or if the location is being used as a placeholder (i.e., to skip a location ID # in the auto-sequence).

1. Click the button labeled `Edit Location` for the sample location you want to modify.
2. A popup box titled **`Edit Sample Location`** will appear.
3. Click the button labeled `Delete Location`.
4. A popup box titled **`Confirmation`** will appear.
5. Click the button labeled `Delete Location` to delete the sample location.
6. The sample location will be removed from your list of active sample locations for the currently selected facility.

Restore a Deleted Sample Location

You can restore a deleted sample location by clicking on either "Show All Locations" or "Show Deleted Locations" and then clicking on the "Restore Location" button.

Notify MassDEP of an Action Taken

1. Click on the button labeled `View Sample Results & Actions Taken`.
2. A popup box will appear listing all sample results for the selected sample location.
3. Click on the button labeled `Edit Actions Taken` for the sample result that triggered the action taken.
4. A popup box titled **`Edit Actions Taken`** will appear with details of the sample result.
5. The bottom half of the modal window is where you will report the actions taken.

6. From the dropdown list titled ***Select an Action***, select the ***Action Taken***. Click on the button labeled `Add Action Taken`.
7. A row will appear in the table below listing the action.
8. Click in the ***Date Performed*** field. A popup calendar will appear.
9. Select the date from the calendar.
10. If you need to add more actions taken repeat steps 6 to 9.
11. Click on the button labeled `Update`.
12. If there are other sample results that triggered an action repeat steps 3 to 11.
13. Click on the button labeled `Close` to close the popup box.

Notify MassDEP of an Inaccurate Sample Result

If you believe that a sample result is incorrect you can notify MassDEP by performing the following:

1. Click on the button labeled `View Sample Results & Actions Taken` for the sample location with incorrect sample results.
2. A popup box will appear listing all sample result for the selected sample location.
3. Find the incorrect sample result row and click on the button labeled `Edit Actions Taken`.
4. A popup box titled **Edit Actions Taken** will appear with details of the sample result.
5. Check the box labeled ***The above sample result(s) is incorrect***.
6. Click on the button labeled `Update`. An email will be sent to MassDEP notifying them of the incorrect sample result. MassDEP will contact you regarding the incorrect sample result. **Note, it is important to maintain up-to-date contact information (for both the account and facilities) in the tool for MassDEP to contact you. See the section Contact Information for how to update your contact information.**

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Downloads Tab

The Downloads tab lists the facility-specific documents available for download. From this tab you can generate and download the Chain of Custody form (PDF), source data (CSV) for creating Bottle Labels or importing into another program, and a printable sampling plan (PDF). For directions on how to create bottle labels using Microsoft Word see Creating Bottle Labels.

Generate and Download a Chain of Custody Form

- Click on the `Download` button. A new tab will open from which you can print the form.
- If your Chain of Custody form is out of sync with the list of sampling locations in the Sample Locations tab, you can force the system to re-generate the Chain of Custody by modifying any sample location's description and then clicking on the `Download` button.

Generate Sample Bottle Label Data

The downloadable file is a CSV (comma separated values) file. It can be used as the source data when creating bottle labels using Microsoft Word through its mail merge function. See Appendix A for instructions on how to perform a mail merge in Microsoft Word. Note, instructions are for Microsoft Word 2010.

- Click on the `Download` button.
- If your Bottle Label file is out of sync with the list of sampling locations in the Sample Locations tab, you can force the system to re-generate the CSV file by modifying any sample location's description and then clicking on the `Download` button.

Note, it is important to maintain up-to-date contact information (for both the account and facilities) in the tool for MassDEP to contact you. See the section Contact Information for how to update your contact information.

Uploads Tab

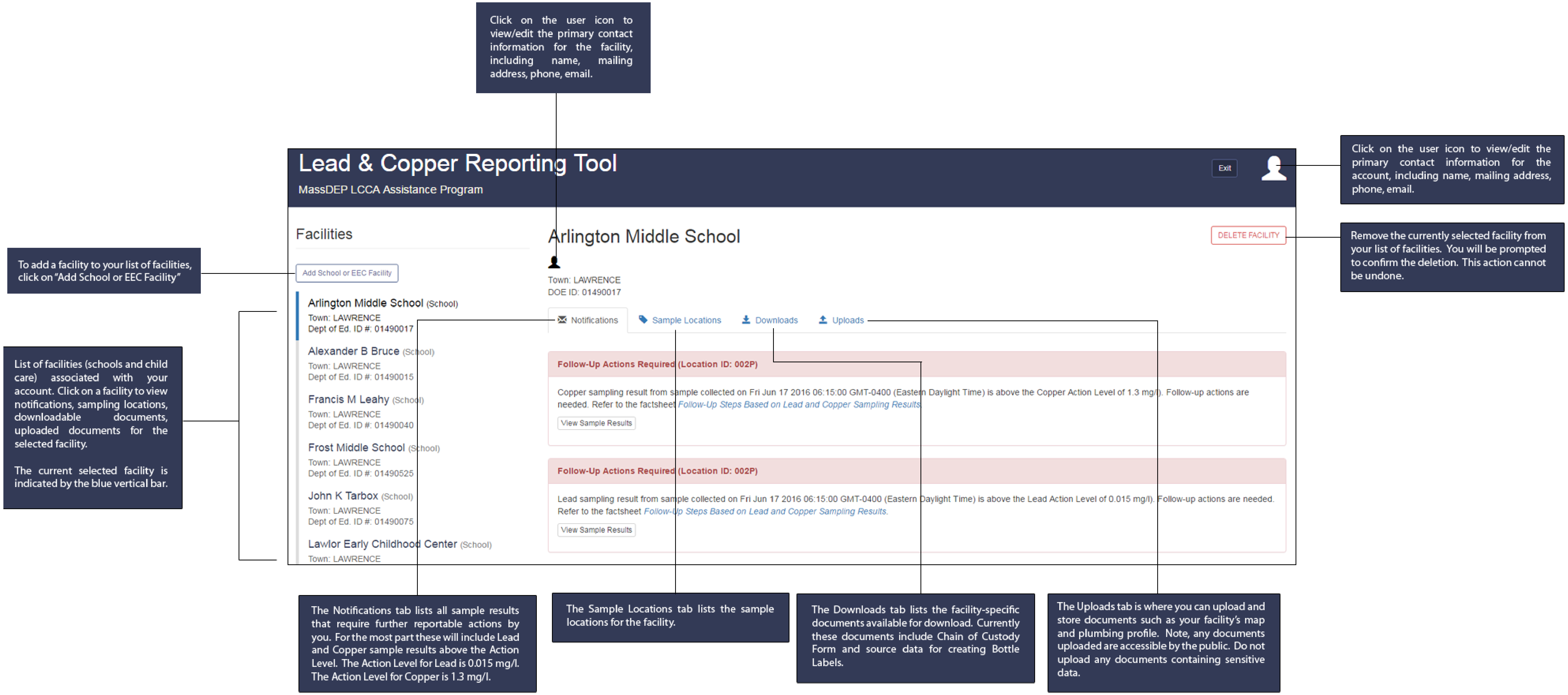
The Uploads tab is where you can upload and store documents such as your facility's sample locations map and plumbing profile. Note, any documents uploaded are accessible by the public. Do not upload any documents containing sensitive data.

Upload a Document

1. Click the button labeled `Upload Document`.
2. A popup box will appear titled **`Upload Document`** will appear.
3. Click on the button labeled `Choose File`.
4. Your computers operating system will display a file browser. Locate the file you want to upload and either double-click the file or click on the button labeled Open.
5. Enter a ***`Document Title`*** for the document. This is similar to a filename.
6. Enter a ***`Document Description`*** for the document.
7. Click the button labeled `Submit`. Depending on the size of your file and your internet connection speed it may take a minute or two to finish uploading.
8. Your uploaded file will appear in the list of files below the button labeled `Upload Document`.

Note, it is important to maintain up-to-date contact information (for both the account and facilities) in the tool for MassDEP to contact you. See the section Contact Information for how to update your contact information.

Figure 1.0



Note, it is important to maintain up-to-date contact information (for both the account and facilities) in the tool for MassDEP to contact you. See the section [Contact Information](#) for how to update your contact information.

Appendix A: Mail Merge Instructions for Creating Bottle Labels

These instructions are excerpted from Microsoft's Support Center. The full set of instructions can be found on the web at https://support.microsoft.com/en-us/kb/294684, including for versions of Word other than Word 2010.

Step 1: Create the mailing label document

Start a new document to create a new label, or open an existing document that you used previously to merge labels.

1. Open the document in Word, and then start the mail merge. To start a mail merge, follow these steps:

   On the **Mailings** tab, click **Start Mail Merge**, and then click **Step by Step Mail Merge Wizard**.

2. Under **Select document type**, click **Labels**, and then click **Next: Starting Document**.

3. Under **Select starting document**, click **Change document layout** or **Start from existing document**.

   With the **Change document layout** option, you can use one of the mail-merge templates to set your label options to create a new label document. When you click **Label options** or **Next: Select recipients**, the **Label Options** dialog box appears. Select the type of printer, the type of label product, and the product number. If you are using a custom label, click **Details**, and then type the size of the label. Click **OK** after completing.

   With the **Start from existing document** option, you can open an existing mail-merge document and use that as your main document.

4. Click **Next: Select Recipients**.

Step 2: Select the data source

The data source contains the information for each label. The data source you will be using is the Bottle Label template CSV file you downloaded from the online tool.

1. Under the **Select Recipients** heading in the **Mail Merge** task pane, select **use an existing list**.

2. In the **Mail Merge** task pane, click **Use an existing list**, and then click **Browse** under the **Use an existing list** heading.

   The **Select Data Source** dialog box appears.

3. In the list of files in the **Select Data Source** dialog box, select the data source and then click **Open**.

   Word displays the **Mail Merge Recipients** dialog box for you to edit your data more. When you finish editing changes, click **OK**.

   Your labels are displayed.

4. Click **Next: Arrange your labels**

Step 3: Edit the label document

1. In the **Mail Merge** task pane, verify that the **Arrange your labels** step is displayed. In this step, you can lay out your labels.

2. Word displays the items that you can use to lay out your labels, such as **Address block**. After clicking in the label where you want to insert, click to select an item to display there.

   Note: Use the **More items** options to add specific fields. This feature is useful if there is some difficulty in laying out a data block, such as Address on the label. The Insert Merge Field allows you to select a field in the block separately, such as First Name, Address 1 or City, so you can insert fields anywhere you like on the label.

   Note: Before clicking **More items**, click in the label where you want to insert the merge fields that represent where Word will print the information from the data source. Make sure that you type any spaces or punctuation that you want between two merge fields or after a merge field, if needed.

3. Work with the dialog which appears after clicking each item. For example, **Insert Address Block** dialog appears if you select **Address block**.

4. Click **Match Fields** to verify if all data fields in the document match with the fields in the source list. You can manually match the fields by selecting correct field from the dropdown list. Click **Ok** once every fields was matched as expected.

5. Verify desired label design is shown in the **Preview** window then click **OK** on the **Insert Address Block** dialog to close it.

6. When you finish setting up one label, click **Update all labels** to replicate all labels.

7. Click **Next: Preview your labels** to preview your merged data. If you feel re-layout is needed at the preview, you can go back to your **Arrange your labels** step by clicking **Previous: Arrange your labels**.

Step 4: Perform the merge

1. In the **Mail Merge** task pane, verify that the **Complete the merge** step is displayed. In this step, you can merge to the printer or on the screen.

   To merge directly to the printer, click **Print**. The **Merge to printer** dialog box appears, so that you can select which records to merge. Click **OK**. The **Print** dialog box appears, so that you can select your printer and print the labels.

   To merge on the screen, click **Edit individual labels**. The **Merge to new document** dialog box appears, so that you can select which records to merge. Click **OK** to merge the labels. You can view the labels before you print them.

2. After the merged document appears on the screen, you can save it as a separate document, you can print the merged document by clicking **Print** on the **File** menu or you can do both.