Lead in Schools
Collect User Manual

Monitoring and Reporting Section
Public Water Supply Bureau
Water Quality Division

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Document History			
Revision #	Revision Date	Revised By	Notes
1.0	3/19/2021	Jolene McQuillan	Initial document development
2.0	6/7/2021	Jolene McQuillan	Added Sample Form information
3.0	8/30/2021	Jolene McQuillan	Updated document for Collect v7.21.2 app
4.0	10/13/2021	Jolene McQuillan	Added Flushing Form instructions
5.0	11/12/2021	Jolene McQuillan	Updated Section 2.0 to create account by email

1.0 Collect Overview

The purpose of this manual is to provide detailed instructions on how to enter your school information, water fixture inventories, and sample COC as part of the Lead Reduction in School Drinking Water Program. This manual is meant to be used in conjunction with the Step 1 - School Setup guidance document which explains what information you need and how to collect it in order to set your school up in the program. The guidance documents can be found at https://deq.mt.gov/water/Programs/dw.

2.0 Request an EQuIS Collect Account

EQuIS Collect is an extension of DEQ's Montana EQuIS database. To use Collect, data submitters must request an EQuIS account. To request an account:

1. Email the following information to DEQLEADINSCHOOLS@mt.gov:
   a. First and Last Name
   b. Email address
   c. City and Zip Code
   d. List all the schools you will be submitting data for
2. Allow 2 business days for your account to be created. Once created, you will receive a confirmation email that includes your EQuIS Collect Credentials.

3.0 Install Collect

EQuIS Collect is supported on iOS, Android, and Windows 10 devices. Determine the operating system on your device and follow the associated instructions below. You may download Collect on multiple devices if needed, but saved forms will not transfer between devices. Using Collect on a mobile device, such as a phone or tablet, allows for greater flexibility and more efficiency while filling out the required forms, but Collect can be used on a desktop computer if that's desired.

3.1 iOS (Apple)

User must have version 9.0 or higher.
1. Open the device's App Store.
2. Search for "EQuIS Collect".
3. Tap **Get** to download and install the application.
4. Once the app is installed on your device, continue to Section 4.0.

3.2 Android

User must have version 7.0 (Nougat) or higher.
1. Open the Play Store.
2. Search for "EQuIS Collect".
3. Tap **Install** to download and install the application.
4. Once the app is installed on your device, continue to Section 4.0.

3.3 Windows 10

User must have version 10.0.16299.0 or higher.
1. Open the Microsoft Start menu and select the Microsoft Store.
2. Search for "EQuIS Collect".
3. Tap **Get** to download and install the application.
4. Once the app is installed on your device, continue to Section 4.0.

4.0 Opening Collect

You are ready to log into Collect once you have 1) installed the application and 2) received your email from DEQ indicating your account has been created.

1. From your devices list of applications, select EQuIS Collect.
2. On the Collect Login screen, enter the required credentials:
   - Server: https://mtdeq.equisonline.com
   - Username or email
   - Password
   - **Forgot your Username and/or Password?** Email DEQLEADINSCHOOLS@mt.gov to request the missing information.
3. To have the app remember your login information, tap or move the 'Remember my credentials' slider to the right. If selected, the next time the app is run, the login screen will be skipped.
4. Tap **Login** to open the app.
5. If prompted, allow EQuIS Collect to access your device's location. Location services must be enabled if a template or form contains a geography field designed to capture the user's current location.
6. If prompted, turn on Direct Edit Mode. This can be accessed from the prompt when signing on, or by opening the upper left Menu → Settings → Data Entry → Direct edit. Direct edit is turned on when colored blue.
   - For all new Collect users, Direct edit is turned on by default.
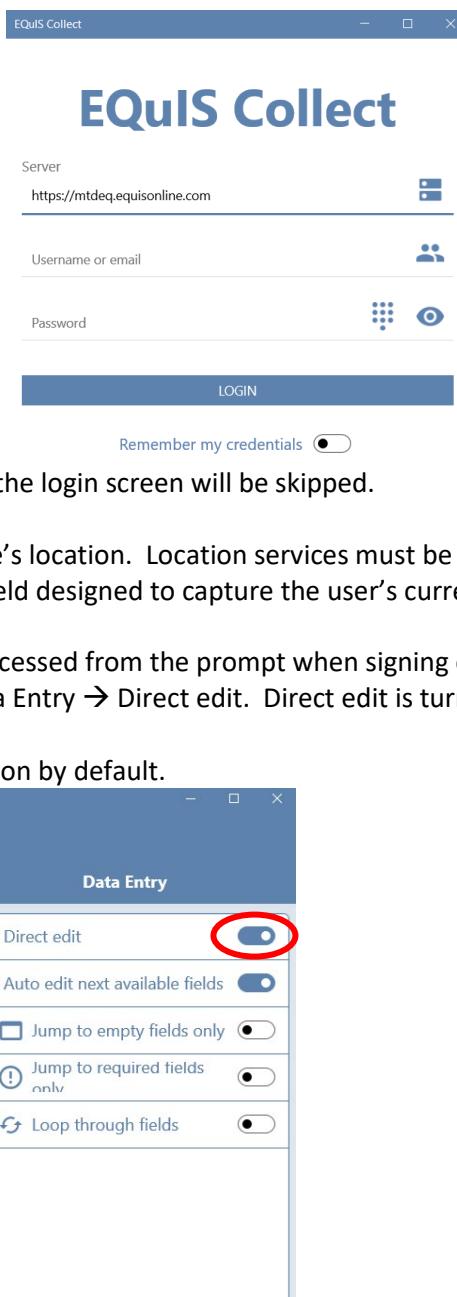
4.1 Quick Start Tutorial

When Collect is opened for the first time, the Quick Start tutorial is displayed. Quick Start is a series of five screens that provide a summary review of the main capabilities of the app. Tap the **Forward** ❯ icon to move through the Quick Start screens. Tap **Start** to open the app after finishing with the Quick Start screens. Tap **Skip** to bypass the Quick Start tutorial.

4.2 Login with PIN

Users have the option to establish a Personal Identification Number (PIN) to use for Collect login. Setting up a PIN allows users to login to Collect without internet connectivity. To setup a PIN, either use the Security tab on the Settings menu or tap the **PIN** ⠿ icon on the Login screen. The user may also opt to bypass setting up a PIN.

5.0 Collect Menu

To access the Collect menu, tap the **Menu** ☰ icon in the upper left corner. The menu displays a list of all options available with Collect.

- **Templates/Forms**: Provides access to templates and forms. All created saved forms will be available as well as the ability to create new templates.
- **Current Form**: Provides access to the most recently used form. This will only populate after a form has been created.
- **Files Synchronization**: The LIS program is currently not using this feature.
- **Settings**: Provides user profile information, access to change various settings, and ability to generate a support or backup package.
- **Help**: Information regarding the use of EQuIS Collect Mobile.
- **Backup**: Save all Collect data on the device as a zip package. The zip package can be restored on any other device running Collect.
- **Online**: Option of working on- or off-line depending on availability to connect to the internet.
- **Logout**: Option for the current user to logout.
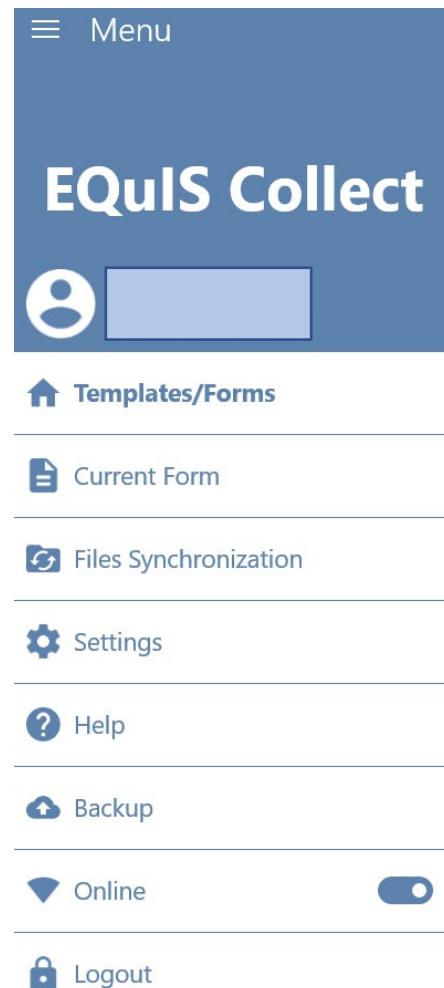
6.0 School Form

The School Form is required for schools to initiate their sampling. School administrators should have a general understanding of the school's maintenance and plumbing history, as well as what is currently being used in the facility, before filling out this form. The following section provides step-by-step guidance on populating and submitting this form.

The School Form includes two parts:
1) Information Form: Basic information about the school as well as contact, building, plumbing, and water source details. Only one Information Form will be created for each school.
2) Inventory Form: Information for each specific fixture including location, type, and if it will be sampled. One Inventory Form will be populated for each fixture, so there will be multiple Inventory Forms for each school.
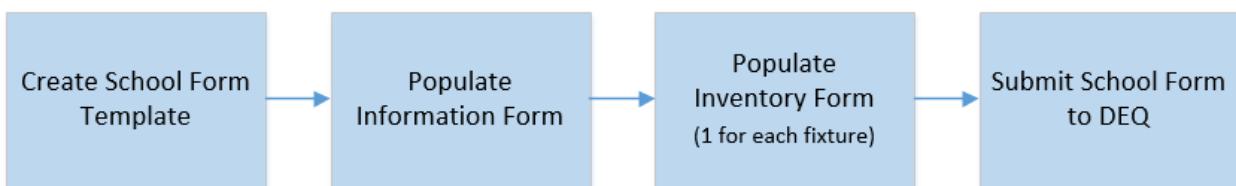
6.1 Create School Form Template

1. Login to Collect. From the Forms screen, tap **New**. If you are not currently on the Forms screen, tap the **Menu** ☰ icon and select **Templates/Forms**.

2. The Information screen opens. Select a Template by tapping **Choose a template**.
3. New templates will display a Download ⬇ icon. Tap on the **Download** ⬇ icon next to **School Form (LIS)**. The template will download to the Collect app so it can be used to collect data, with or without online connectivity.
   a) NOTE: When a downloaded template has been changed in the database, a refresh ↻ icon is displayed next to the template (instead of a download icon). Click the refresh icon to download the updated version.
   b) The form name will include a version number (e.g., School Form – 1). Do not be concerned if the number is different than the screenshots included in this manual.
4. Tap **School Form (LIS)** again to select it. A check mark indicates it is selected.
5. Tap **OK**.

6. A default form name will appear in the Name field. It is highly recommended to update the Name field to include the school name, especially if you will be submitting forms for more than one school.

7. Select a school by tapping **Choose a facility**.
8. In the Facility Chooser window, tap on the school name to select it. Once you see a check mark next to the school, tap **OK**. All required fields are now populated.
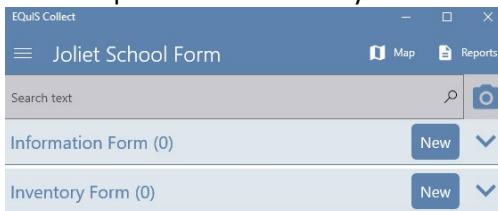

9. Tap **Save**. The School Form Template for the school you selected will open.

6.2 Populate Information Form

1. Tap **New** next to Information Form.
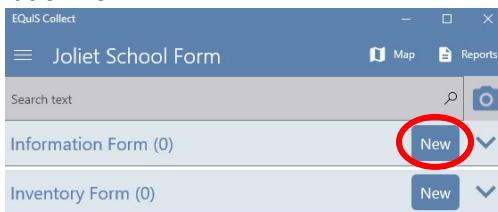
2. The form will open.
   - Clicking on the form title (e.g., Information Form) or School ID (e.g., MTOPI00000) will take you back to the main form template.
   - Clicking on the up and down arrows will hide or expand each subsection of a form.
   - Select **Save** at any time to save your progress.

3. Tap in the **Student Enrollment** field to begin populating the form.

4. Tap in the dropdown box for the next question to select **Yes** or **No**. For questions with multiple choices, make your selections in the pop-up window. If more than one selection can be made, make your selections and tap **Save** at the bottom of the pop-up window.

5. Continue populating the next sections of the form, Authorized Representative Contact Information and Building Information.
6. In the Water Supply Information section, select **Well** or **Municipal Connection** for the 'Source of Water' question.
   - If Municipal Connection is selected, the next question will ask for the connection name. Use the search text field to search for the Municipal Connection name.
7. Answer the remaining Water Supply Information questions.
8. For 'Attach Fixture Floor Plan', tap the **Select a File** button to browse to the school's Fixture Floor Plan.

- More information on Fixture Floor Plan requirements can be found on DEQ's Lead in School webpage: http://deq.mt.gov/water/Programs/dw

9. In the final Questions section, select **Yes** or **No** for 'Opt in to the Reminder service?'. This provides consent for DEQ to send automated reminders about upcoming deadlines associated with the Lead in School program.
10. Select **Yes** for the 'Completed record?' question once all required fields have been populated.
11. Select **Save** in the upper right corner of Collect. You will return to the School Form template.
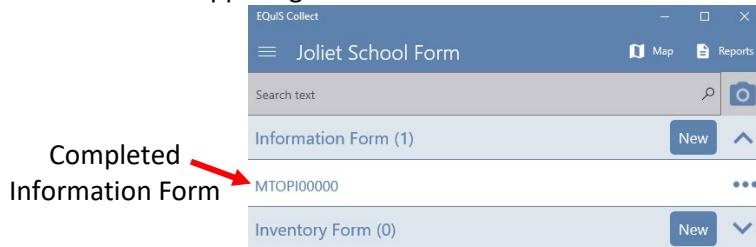

6.3 Populate Inventory Form

1. Tap **New** next to Inventory Form.
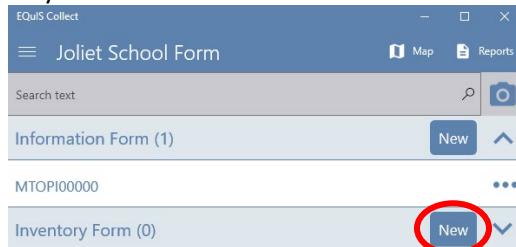
2. The form will open. All the fields on the Inventory Form are on one page. Complete each question, making sure to scroll to the bottom of the form. When all questions have been answered, tap **Save** to save your entries and return to the School Form template.

First completed Inventory Form

3. Tap **New** next to Inventory Form and repeat step 2 to provide information for the next fixture. Each fixture from the Fixture Floor Plan will require a new Inventory form.
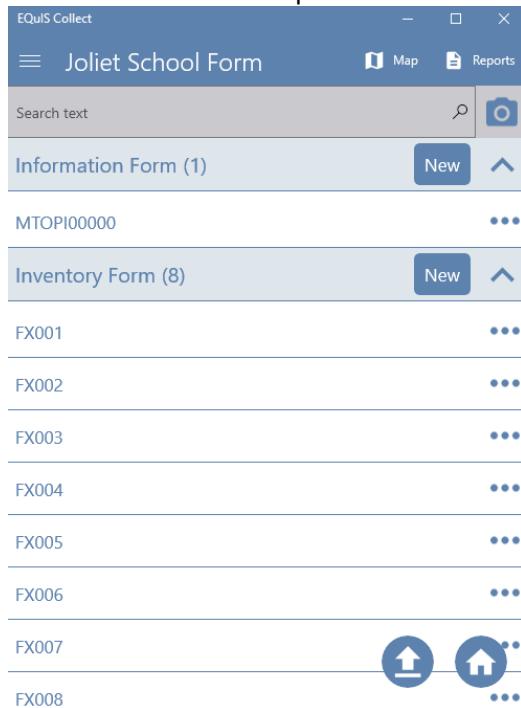

6.3.1 Copy Inventory Forms

There will be situations where multiple fixtures are very similar besides the Fixture Number and possibly the Location Description (e.g. a row of sinks in a bathroom). Collect has a copy feature that can speed the process of data entry if caution is taken to update the necessary information.

To copy an Inventory Form:
1. Tap the **three dots** ••• on the right side for the fixture you want to copy.

2. In the prompt, tap **Copy**.
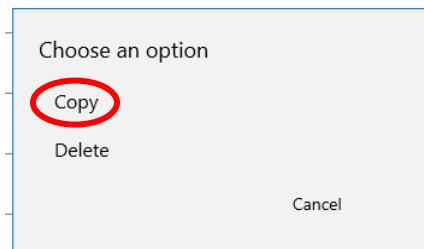
3. The copied form will open. Update the Fixture Number.
4. Update any other fields that need to be changed. When all fields are correctly populated, tap **Save** to save your entries and return to the School Form template.
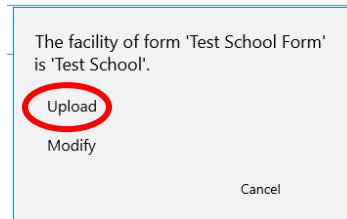
6.4 Submit School Form to DEQ

Once the Information Form is complete and an Inventory Form has been created for each fixture, you are ready to submit to DEQ.
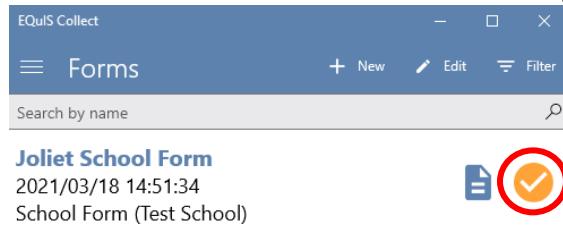
1. Tap the **Upload** ⬆ icon in the bottom right of Collect.

2. In the prompt, tap **Upload** to submit the data directly to DEQ. NOTE: If you click outside the prompt window, the form will automatically upload.

3. After selecting Upload you will return to the Forms screen. The orange symbol next to the uploaded School Form indicates the EDD is 'Received and Processing'.

4. The EDD will process in the order it was received. It could take anywhere from 5-30 minutes for the EDD status to change. Tap the **Refresh** 🔄 icon in the bottom left of the Forms screen to update the EDD status.

5. If the EDD has processed with no errors, the green 'Pass' icon will show. You will also receive an automated email indicating your EDD was accepted within one business day.

6. If the EDD failed data checks, the red 'Fail' icon will show. You will also receive an automated email within one business day indicating your EDD had errors. If you have an EDD that fails, please contact DEQLEADINSCHOOLS@mt.gov for next steps.
7. **After the School Information Form has been successfully submitted through Collect, allow up to 5 business days for your schools Water Sample Form to be available.** When the form is ready, it will appear in the Template/Forms menu in Collect.
   a. Email DEQLEADINSCHOOLS@mt.gov if you do not see your school's Water Sample Form within 5 business days.
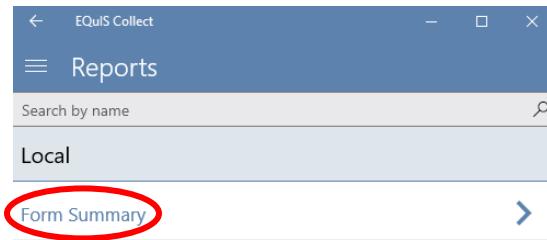
6.5 Print School Form Report

This is an optional step that will allow you to print the information you submitted to DEQ in the School Form. To create a PDF report of the information submitted to DEQ:
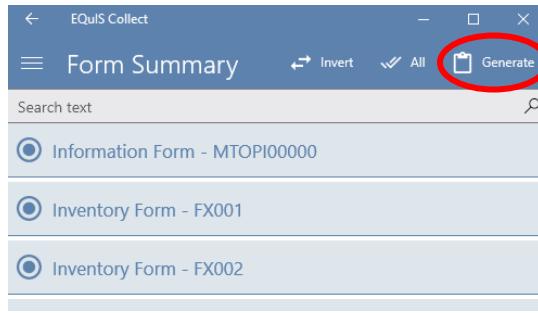
1. Tap the **Report** button by the School Form.

2. Tap **Form Summary** in the Local section.

3. In the Form Summary, all the items are automatically selected for inclusion in the report. Tap the **Report/Generate** icon to run the Form Summary report.

4. After the report is displayed, tap the **Print** icon to print the report to a connected printer. Tap the **Share** icon to share the document via email or within other apps on your device.
   - NOTE: The Share options will vary depending on your device settings.
   - The Save option is currently not operational.
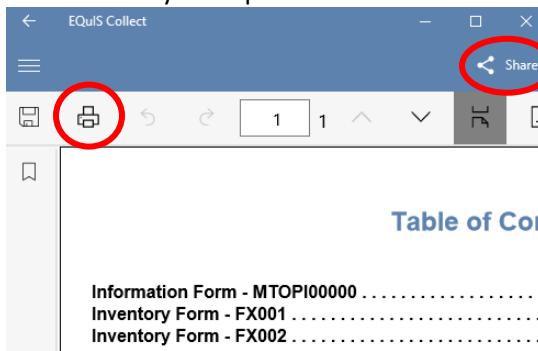
7.0 Water Sample Form

After the School Information Form has been successfully submitted through Collect, allow up to 5 business days for your schools Water Sample Form to be available. When the form is ready, it will appear in the Template/Forms menu in Collect. The Water Sample Form is a Collect form specific to your school that is required before samples can be collected. The Water Sample Form will record sample collection information, provide Sample IDs for your bottles, and create the COC for you to print for the lab. The following section provides step-by-step guidance on populating and submitting this form.
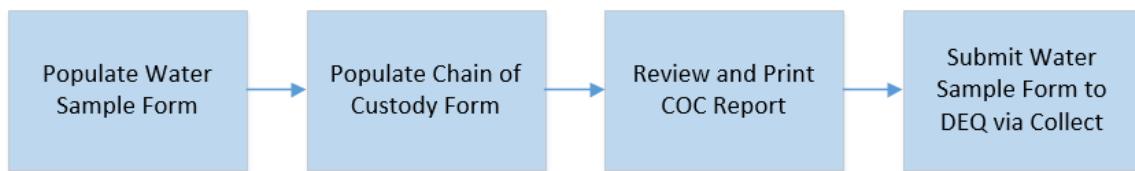

NOTE: The COC will need to be printed from the Collect app. Make sure the device you are using to populate the Water Sample Form is connected to a printer, or the COC can be saved as a PDF and transferred to another device.

NOTE: Remember saved forms will not transfer between devices. Once you start entering information on one device, that information will need to be re-entered if you switch to a different device.

7.1 Populate Water Sample Form

1. Login to Collect. When the school Water Sample Form is ready, it will appear on the Forms screen along with any other forms you have created. Tap the **form name**.
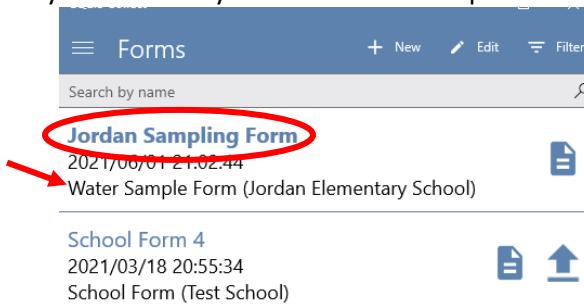
2. The form will open. Tap the **Down** ⌄ arrow next to the Water Sample section.

17
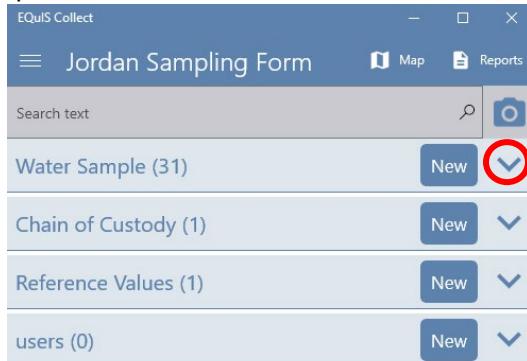
3. All fixtures that were marked 'Yes' for the 'Part of Sampling Plan' question in the Inventory Form will be listed here. These will be all the samples you will collect and submit to the lab. Tap the **Fixture ID** for the first sample you want to record.

4. Confirm this is the correct Fixture ID you are collecting a sample for. Tap the **Down** ⌄ arrow to expand the Sample Collection section, then tap in the **Sample Date** field.

Confirm correct Fixture ID

5. Enter the date the sample was collected and tap the check mark at the bottom of the window.
   • The current date is the default. When changing the date, make sure you select the check mark or the selected date will not be saved.

6. Enter the time the sample was collected.
7. Provide additional comments in the Sample Notes field, if needed, and tap **Save** to save your changes and return to the Sampling Form.

8. Notice the Sample ID has been updated to include the sample date and a check mark indicates the sample was collected and is ready for the COC.
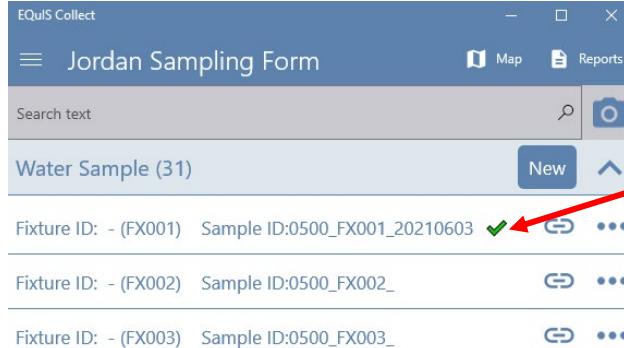
9. <u>Record the complete Sample ID on the sample bottle.</u> This is an important step so the lab can match the sample bottles submitted to the samples listed on the COC.
10. Continue entering the sample information by tapping the next Fixture ID. Record the date, time, additional comments, and save the record. Make sure to scroll down to see all the fixtures. Once all the samples on the Sample Form have a check mark next to them, you are ready to review your COC.

7.2 Populate Chain of Custody Form

Before the COC can be created, some additional information needs to be entered into the Chain of Custody form.

1. Confirm all the samples you are submitting have a green check mark next to them in the Water Sample section.
2. Tap the **Down** ⌄ arrow next to the Chain of Custody section to expand it.
3. Tap the empty record in the Chain of Custody section.

4. The Chain of Custody form will open. Tap in the **Lab** drop-down field and select the Lab Name you will be submitting your samples to.
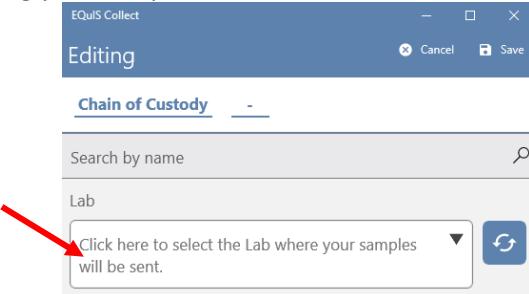
5. Tap in the **COC Date** field and select the date you will be submitting your samples to the lab.
6. Enter the email address you want the results sent to in the 'Send EDD/Hard Copy to' field, separate multiple email addresses with commas.
7. Scroll down to the **CoC Samples** drop-down field and tap to open the list. All the completed samples (those with check marks) will be listed. Tap each sample to select it for the COC. It is selected when a check mark appears. Make sure all samples have a check mark next to them before moving on. When done, tap **Save** at the bottom of the pop-up window.

Confirm all samples have a check mark
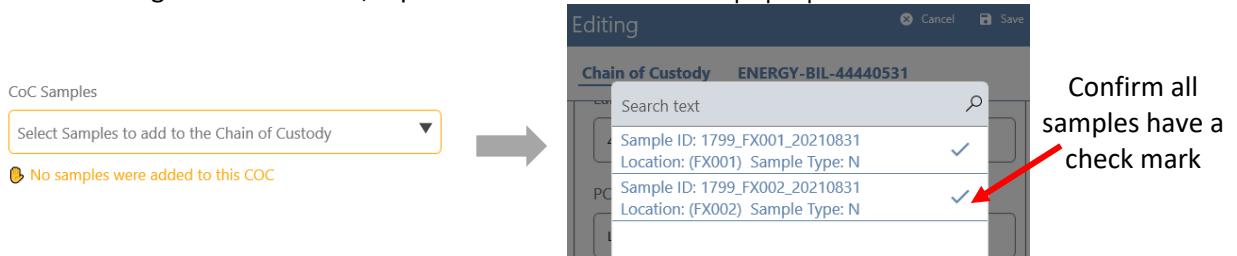
8. Enter any additional comments or special instructions for the COC. Tap the **Forward** ❯ icon.
9. Enter the total number of coolers you will be delivering, or shipping, to the lab. Rest of the COC fields are prepopulated and should not be changed. Tap **Save** to return to the COC form.
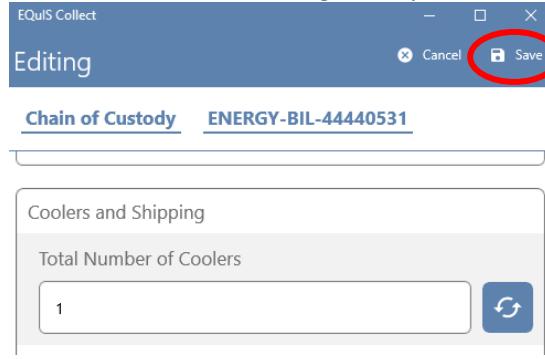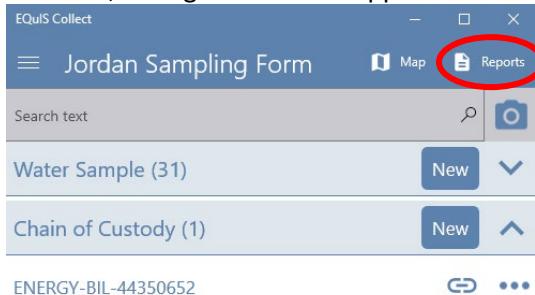

10. The COC information is all entered, now it is time to review and print the COC.
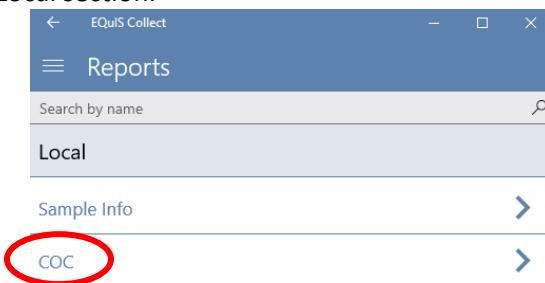
7.3 Review and Print COC

1. From the main Water Sample Form, tap **Reports**.
   - If Reports is not visible, enlarge the Collect app window.

2. Tap **COC** under the Local section.

3. All the samples previously selected will be listed. Tap **Generate** to create the COC.

4. The COC will be created. **Review each page of the COC to confirm all the samples are listed and the date and time for each sample is correct.**
   - If you see any errors, go back to the main Water Sample Form, locate the sample, and make your corrections. Then generate the COC again and review until it is error-free.
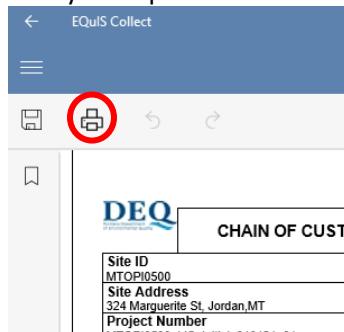
5. To print the COC, tap the **Print** icon and select a printer connected to your device, or select Adobe PDF to save the COC as a PDF and transfer to another device to print.
   - NOTE: The Share options will vary depending on your device settings.
   - The Save option is currently not operational.

6. Print one copy of the COC for each cooler you will be delivering/shipping to the lab.
7. **Don't forget to sign the COC!** Sign your full name in the 'Relinquished By' box on the COC.
8. For further instructions on how to pack and deliver the samples, refer to 'Step 2 – Sample Preparation and Collection' document on DEQ's Lead in School webpage: https://deq.mt.gov/files/Water/LeadinSchools/Step2_HowtoCollectSamples.pdf

7.4 Submit Water Sample Form to DEQ

After printing the COC, the final step is to submit the Water Sample Form to DEQ. This process is done through Collect the same way the School Information and Inventory Form was submitted.

NOTE: This is a very important step before the lab submits the results. Do this immediately after printing the COC so it is not forgotten.

1. There are two locations where a form can be uploaded:
   a. From the Forms screen you can tap the **Upload** ⬆ icon next to the Water Sample Form you are ready to submit.
      -OR-
   b. You can open the Water Sample Form and tap the **Upload** ⬆ icon in the bottom right.
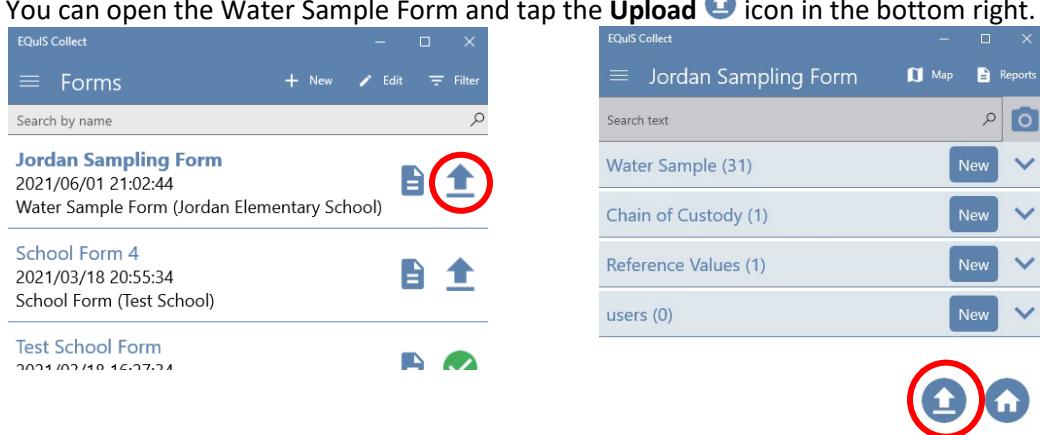
2. After selecting Upload, return to the Forms screen. The orange symbol next to the uploaded Water Sample Form indicates the EDD is 'Received and Processing'.
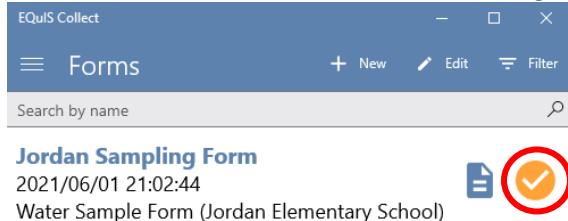
3. The EDD will process in the order it was received. It could take anywhere from 5-30 minutes for the EDD status to change. Tap the **Refresh** ↻ icon in the bottom left of the Forms screen to update the EDD status.
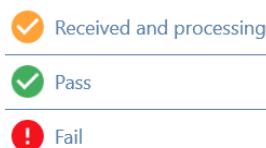
4. If the EDD has processed with no errors, the green 'Pass' icon will show. You will also receive an automated email indicating your EDD was accepted within one business day.
5. If the EDD failed data checks, the red 'Fail' icon will show. You will also receive an automated email within one business day indicating your EDD had errors. If you have an EDD that fails, please contact DEQLEADINSCHOOLS@mt.gov for next steps.

8.0 Flushing Form

Flushing forms should be submitted to DEQ using the Collect School Flushing Form. This form allows for a PDF flushing plan to be uploaded and submitted, or the flushing plan can be entered for each fixture directly into Collect.

## 8.1 Create Flushing Form Template

1. Login to Collect. From the Forms screen, tap **New**. If you are not currently on the Forms screen, tap the **Menu** ☰ icon and select **Templates/Forms**.

2. The Information screen opens. Select a Template by tapping **Choose a template**.
3. New templates will display a Download ⬇ icon. Tap on the **Download** ⬇ icon next to **School Flushing Form (LIS)**. The template will download to the Collect app so it can be used to collect data, with or without online connectivity.
    a) NOTE: When a downloaded template has been changed in the database, a refresh ↻ icon is displayed next to the template (instead of a download icon). Click the refresh icon to download the updated version.
    b) The form name will include a version number (e.g., School Flushing Form – 1). Do not be concerned if the number is different than the screenshots included in this manual.
4. Tap **School Flushing Form (LIS)** again to select it. A check mark indicates it is selected.
5. Tap **OK**.
6. A default form name will appear in the Name field. It is highly recommended to update the Name field to include the school name, especially if you will be submitting forms for more than one school.
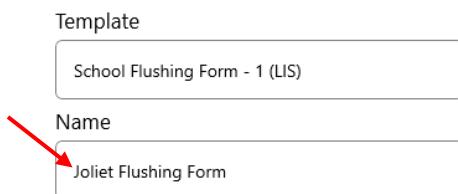
7. Select a school by tapping **Choose a facility**.
8. In the Facility Chooser window, tap on the school name to select it. Once you see a check mark next to the school, tap **OK**. All required fields are now populated.
9. Tap **Save**. The School Form Template for the school you selected will open.
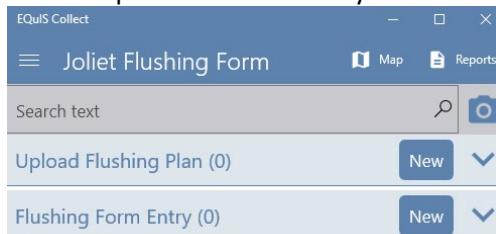
8.2 Populate Flushing Form

There are two options for submitting flushing information. Either option, or both options, can be used when submitting the Collect School Flushing Form.

1. Upload Flushing Plan PDF
2. Enter flushing plan for each fixture including flushing order, duration, and fixture ID.
   NOTE: In order to submit a flushing plan for each fixture, the school fixtures must have already been uploaded to DEQ's database.

8.2.1 Upload Flushing Plan

1. Tap **New** next to Upload Flushing Plan.
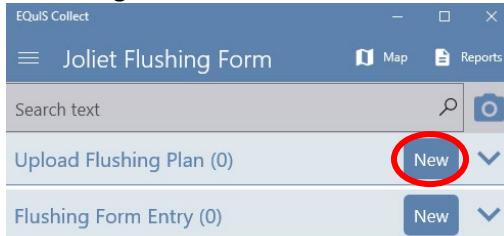
2. Tap the **Select a File** button to browse to the school's Flushing Plan. Only PDF files can be submitted and only one file can be submitted for a school.
3. Once the file is selected, tap **Save** to save your PDF selection and return to the Flushing Form template.
4. If only uploading a Flushing Plan PDF, continue to step 8.3 to submit the Flushing Form to DEQ.

8.2.2 Flushing Form Entry

1. Tap **New** next to Flushing Form Entry.
2. The form will open. Populate 'Flushing Order', 'Fixture Number', and 'Duration of Flush'. When all three fields have been populated, tap **Save** to save your entries and return to the Flushing Form template.

3. Tap on the **Pencil** icons under your last entry to create a new flushing fixture entry.
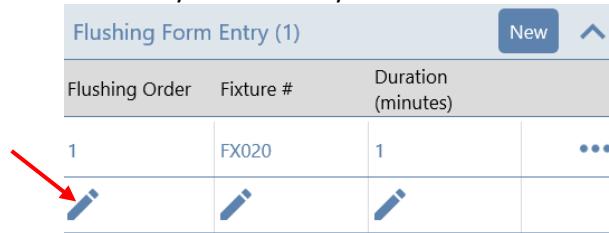
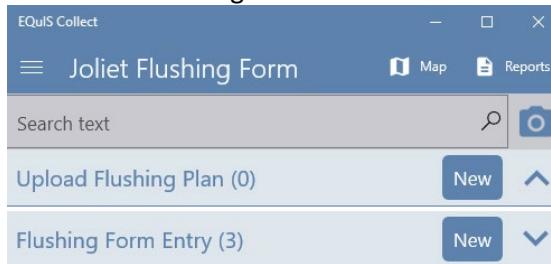| Flushing Form Entry (1)			New	∧
Flushing Order	Fixture #	Duration (minutes)		
1	FX020	1		•••
✏	✏	✏		

4. Repeat step 2 to provide information for the next fixture. Each fixture that is part of the flushing plan must have a new entry.
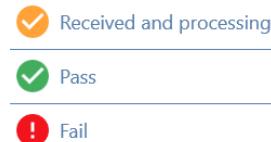
8.3 Submit Flushing Form to DEQ
Once the Flushing Form is complete, you are ready to submit to DEQ.
1. Tap the **Upload** 🔵 icon in the bottom right of Collect.

EQuIS Collect	— □ ✕
≡ Joliet Flushing Form	📖 Map 📄 Reports
Search text	🔍 📷
Upload Flushing Plan (0)	New ∧
Flushing Form Entry (3)	New ∨

⬆ 🏠

2. In the prompt, tap **Upload** to submit the data directly to DEQ.
3. After selecting Upload you will return to the Forms screen. The orange symbol next to the uploaded Flushing Form indicates the EDD is 'Received and Processing'.
4. The EDD will process in the order it was received. It could take anywhere from 5-30 minutes for the EDD status to change. Tap the **Refresh** ⟳ icon in the bottom left of the Forms screen to update the EDD status.

✅ Received and processing
✅ Pass
❗ Fail

5. If the EDD has processed with no errors, the green 'Pass' icon will show. You will also receive an automated email indicating your EDD was accepted within one business day.
6. If the EDD failed data checks, the red 'Fail' icon will show. You will also receive an automated email within one business day indicating your EDD had errors. If you have an EDD that fails, please contact DEQLEADINSCHOOLS@mt.gov for next steps.

9.0 Troubleshooting

- I can't log into Collect after receiving the email that my account was activated.
  - Make sure you are logging into the Collect application, NOT EQuIS Enterprise where you initially created your account. <u>Your account will not work in EQuIS Enterprise, only in the Collect app.</u>
  - Confirm you are entering your user name and password correctly. If you still have issues logging in, please email DEQLEADINSCHOOLS@mt.gov.

- The Collect app is taking a long time to save.
  - DEQ is working with EarthSoft to improve performance. If Collect starts to slow down, save your current work, sign out, and sign back in.
  - If Collect is not in use, please close the app completely.

- When creating the School Form Template, I don't see my school listed.
  - Email DEQLEADINSCHOOLS@mt.gov to request the school be added. Please include the school name and city in your email.