United States Environmental Protection Agency

HealthySEAT

Healthy School Environments Assessment Tool

Version 2

User's Manual

October 2007

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Section 1
Introduction

Reminder:

Make frequent copies of your data file (BE_HSEAT.mdb).

1.1 Overview

EPA has developed a unique software tool to help school districts[1] evaluate and manage their school facilities for key environmental, safety and health issues. The *Healthy School Environments Assessment Tool* (HealthySEAT) is designed to be customized and used by district-level staff to conduct completely voluntary self-assessments of their school (and other) facilities and to track and manage information on environmental conditions school by school. In addition to powerful software that can be used by districts to track any facility issues it chooses, EPA has also included critical elements of its regulatory and voluntary programs for schools, as well as web links to more detailed information. Districts and others can download HealthySEAT at no cost from the EPA web site. HealthySEAT is meant to be loaded and used on district computers; once it is downloaded from the EPA web site, HealthySEAT can be customized and used as the district sees fit. There are no reporting requirements and no obligations to use the checklist EPA has provided.

1.2 Purpose of HealthySEAT

Numerous public, private, charter, and tribal schools in the United States contain hazards that may pose risks to children and staff. The guidance included in HealthySEAT can improve the health of students and staff by ensuring that potential environmental and safety hazards in schools are being properly managed. Examples of school environmental hazards include chemical releases, pesticide exposures, flaking lead paint, mold and other indoor air quality problems, and damaged asbestos-containing building materials.

HealthySEAT will help school districts identify and correct hazards before they result in:

- Health problems in students and staff such as asthma attacks, lead poisoning, and other chemical exposures;
- Productivity and performance losses in students and staff;
- School closures due to spills, accidents, or other preventable environmental, health and safety issues;
- Costly building clean-ups;

[1] For simplicity, EPA is using the term “district” to broadly describe any institutional system for managing multiple schools, whether they are public, private, tribal, charter or some variation. While HealthySEAT is primarily geared toward K-12 school facilities, it may also be useful for colleges and universities as well as other types of buildings.

- Regulatory enforcement actions by state or federal agencies; and
- Community concern and resource-draining media attention.

In addition, HealthySEAT will help school districts:

- Collect the kind of school- and hazard-specific data necessary to make a compelling case for needed renovation, repair and maintenance dollars; and
- Demonstrate to the community that your district is committed to the health and safety of children and staff.

1.3 Components of HealthySEAT

HealthySEAT consists of three primary components: 1) a web page; 2) this user's manual; and 3) the tracking software. The web page, www.epa.gov/schools, provides information about HealthySEAT and allows school districts, states, and others to download HealthySEAT at no charge. Future updates to HealthySEAT can be obtained from this same web page. This user's manual provides step-by-step instructions for customizing and using HealthySEAT. The tracking software helps districts manage all aspects of a district-wide assessment program, including generating letters to individual schools pre-and post assessment visit, tracking the status of facility conditions and corrective actions school-by-school, and creating and generating reports for district use.

From within the tracking software, the district can generate and print its own:

- *Customized Assessment Guidebook*: While the default guidebook provided with HealthySEAT includes an extensive collection of assessment standards, districts may customize the guidebook by choosing which standards to include in their assessment program, as well as adding standards specific to state or local regulations. All aspects of the tool can be easily customized by school districts to reflect the programs and requirements specifically applicable to their schools. The resulting customized assessment guidebook can be printed, showing full details for all assessment standards included in the district's assessment program. Section 4.2.1 of this user's manual provides guidance on how to customize the assessment guidebook. Section 6 of this user's manual provides guidance on how to generate a printed copy of the guidebook.
- *Master Checklist*: A master assessment checklist can be printed once the assessment guidebook has been customized. It is simply a different way of presenting the assessment standards included in the assessment guidebook, and is thus affected by changes to the assessment guidebook. This master checklist can be used by assessors in the field to conduct comprehensive assessments of school facilities (see Section 6 of this user's manual for instructions on printing the Master Checklist).

- *Custom Checklists (new in Version 2)*: More specific custom checklists can also be created and printed for special-purpose assessments (e.g., asbestos assessments). These custom checklists are subsets of the master checklist, and, like the master checklist, are affected by changes to the district's assessment guidebook. Section 4.2.2 of this user's manual provides guidance on how to create custom checklists.

- *Assessment Notification Letters*: HealthySEAT includes a standard assessment notification letter, which is used for assessments based on the master checklist, and which can be edited. Additionally, beginning with Version 2, custom notification letters can be created and linked to custom checklists, thereby providing more specific information to school facilities about upcoming special assessments. Section 4.2.4 of this user's manual provides guidance on adding and editing notification letters.

1.4 Organization of HealthySEAT

The HealthySEAT software is organized into three primary functions, each of which is represented by a button on the Main Menu:

- *Customize for District*: The Customize for District function allows districts to fully customize the tool for use, including adding its own name and district logo, facilities, assessors, and contacts for remediation, as well as tailoring the assessment program content to district policies, programs and priorities. Districts can also tailor the prioritization scheme included with the tool, customize letters and manage security features, among other administrative functions.

- *Manage School-Specific Assessments*: The Manage School-Specific Assessments function allows districts to enter and store information about every assessment conducted at individual facilities, track the status of every recommendation, and generate customized letters and reports for individual schools pre-and post-visits.

- *Open Reports/Output Menu*: The Open Reports/Output Menu function allows districts and other users to select from a variety of report options which organize and extract information from the database. Two example reports include Number of Open Recommendations by Facility and Recommendations Details by Facility.

While HealthySEAT is designed to allow full customization of the content by school districts, the software comes pre-loaded with a checklist that covers a wide array of issues that school districts may wish to assess for each of their schools. The checklist is organized by the physical areas of the school to be assessed, the issue-specific topics and subtopics for each area of the school, and specific assessment standards representing the positive conditions an assessor would look for in each area of the school facility.

In addition to information on EPA programs, HealthySEAT also includes information on safety, health and injury prevention, including:

- National Institute for Occupational Safety and Health (NIOSH) comprehensive Safety Checklist Program for Schools, which contains recommendations as well as detailed checklists on Occupational Safety and Health Administration (OSHA) regulations which may be applicable to schools;

- Centers for Disease Control, Division of Adolescent and School Health recommendations based on the CDC/DASH School Health Index; and

- Department of Education Safe and Drug Free Schools Crisis Management program.

1.5 Intended Uses of HealthySEAT

HealthySEAT is intended primarily as a tool for school districts to use to periodically evaluate their school facilities at a macro level to be sure that all of the essential elements of key programs are being properly managed school-by-school. Districts choose the frequency with which they will conduct assessments, though EPA recommends that an assessment be conducted at each school at least annually. Districts may conduct the assessments using district staff, school-based staff, contractors, or a combination, depending on their particular circumstances and available resources.

The HealthySEAT software is designed specifically to manage information on multiple facilities. For this reason, the software itself is not intended to be used by individual schools. However, the customized checklist and guidebook developed by the district will be a potentially valuable resource for school-based as well as district staff.

It is important to note that HealthySEAT is not a substitute for the day-to-day vigilance and good practice that is required at every school to effectively manage environmental, safety and health issues in a manner that protects children, staff and the environment at all times.

Many states and school districts are already undertaking or encouraging school facility assessments, and EPA has designed HealthySEAT so that these states and districts can easily incorporate their own checklists into the software. During and after the customization process, a simple toggle switch allows districts to view and use either the district-customized program or EPA-included assessment standards.

EPA strongly encourages states to work across the appropriate state agencies to incorporate state requirements into HealthySEAT to help reduce the duplication of effort required for each district to independently research state requirements.

Section 2
Installation

> **Reminder:**
>
> Make frequent copies of your data file (BE HSEAT.mdb).

This section covers the steps required for installation of HealthySEAT. These instructions are tailored for users downloading HealthySEAT from EPA's web site (http://www.epa.gov/schools), which is the primary distribution channel for the tool. When installing HealthySEAT from a CD-ROM, or from any other media type, please see the installation instructions included with that media.

2.1 System Requirements

HealthySEAT was developed using Microsoft Access 2003, a Runtime version of which is included with the installation package. Users of HealthySEAT, therefore, do not need to own or purchase Microsoft Access. Following are the minimum system requirements for using HealthySEAT:

- Windows 2000 or XP Operating System
- Pentium-compatible chip (233 MHz or higher), III Recommended
- 128+ MB of RAM
- Optimal screen resolution of 1024 x 768 pixels
- Screen color quality (16-bit or better)

NOTE: HealthySEAT does not work with Windows NT, 95 or 98 or Apple Macintosh operating systems. There may also be issues with installing HealthySEAT on a computer running the Windows Vista operating system. Check EPA's HealthySEAT website (http://www.epa.gov/schools) for information about Vista compatibility.

2.2 Downloading HealthySEAT

HealthySEAT can be downloaded from EPA's web site at http://www.epa.gov/schools.

2.3 Installing HealthySEAT

NOTE: These installation instructions apply whether you are a first time HealthySEAT user or are upgrading from HealthySEAT Version 1 to Version 2. Information for Version 1 users on how to re-connect to their existing Version 1 data file from the new Version 2 is contained in Section 4.3.1 of this manual.

When installing HealthySEAT, please take note of the following:

- Administrative rights,[2] meaning a user who has full administrative control over the domain and/or the computer, are required for the installation of HealthySEAT. To obtain or verify the status of administrative rights, contact the district's IT department for assistance.

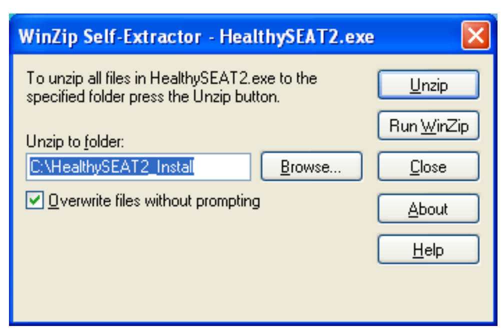
- Microsoft Access 2003 Runtime is automatically installed along with HealthySEAT.

- NOTE: If the user has other MS Access databases that require a full (non-Runtime) version of MS Access already installed on the computer, users may find that their other database files may no longer open by simply double-clicking on them (or their shortcuts). This is because each time HealthySEAT is run, Windows will associate all files using the .MDB file extension with Microsoft Access 2003 Runtime version. This is a typical Windows characteristic any time multiple versions of any software are present on a computer. However, the files have not been damaged or moved, and can be easily opened simply by highlighting and right-clicking the file, choosing "Open with..." and selecting the appropriate full version of MS Access (i.e., 97, 2000, 2002, 2003). A more permanent solution is to modify shortcuts for existing database files to include the full path of the executable (.EXE file of the appropriate version of MS Access.

- Each time HealthySEAT is downloaded and installed, a new (empty) version of the HealthySEAT "back end" database will be placed on the computer (see Section 7.1 of this User's Manual for a more detailed explanation of the "back end" database). If the user has an existing database, using the "Re-establish Database Connection" option on the "Customize for District" menu will be required to link the newly installed HealthySEAT application to the existing database. See Section 4.3.1 of this User's Manual for detailed instructions on re-establishing the database connection.

After successfully downloading HealthySEAT (see Section 2.2 above), the HealthySEAT application can be installed by following the steps outlined below:

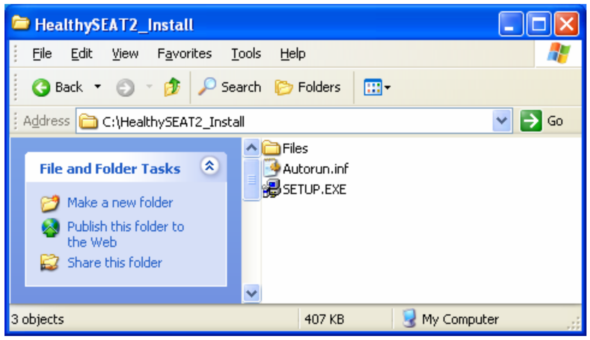
1. Double-click healthyseat2.exe. A window labeled WinZip Self-Extractor will open. Click the "Unzip" button to extract installation files to the default folder C:\HealthySEAT2_Install, or click browse to select another folder. If you do not use the default folder be sure to make note of your selected folder location. After the files have been extracted, click "OK" and then "CLOSE"



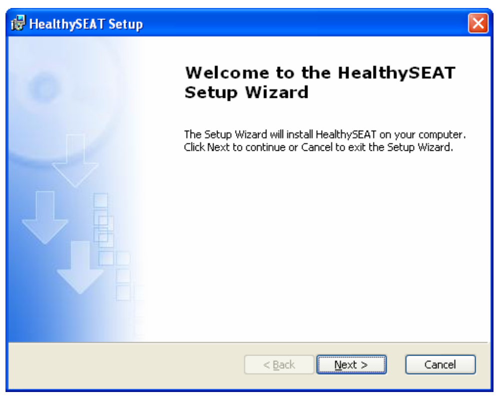
[2] For Windows XP Home Edition, a person who can make system-wide changes to the computer, install software, and who has access to all files on the computer. A person with a computer administrator account has full access to other user accounts on the computer.

the window.

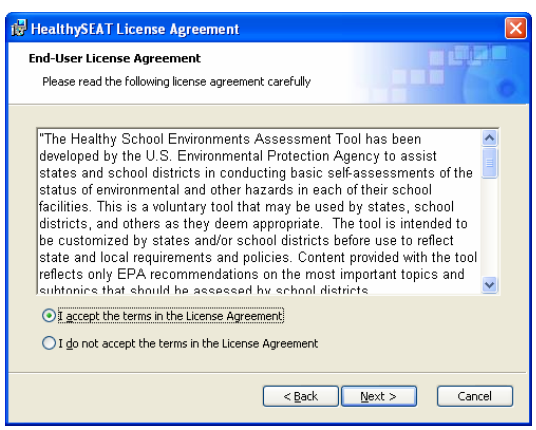
2. Go to the folder into which the installation files were extracted (default folder C:\HealthySEAT2_Install), then double-click the SETUP.EXE file.



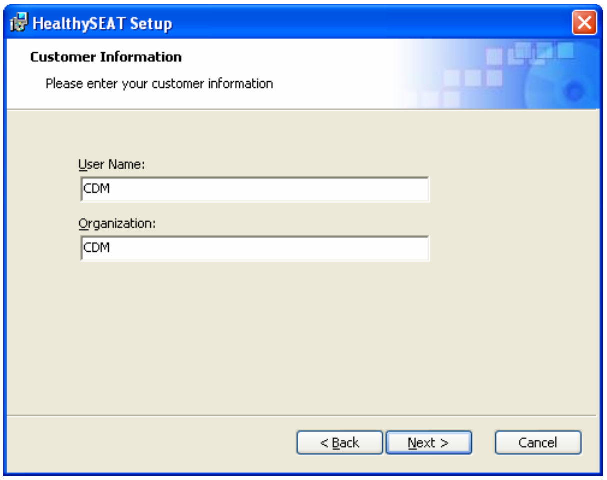
3. The HealthySEAT Setup Wizard should start. Click on the "Next" button on the "Welcome…" screen.



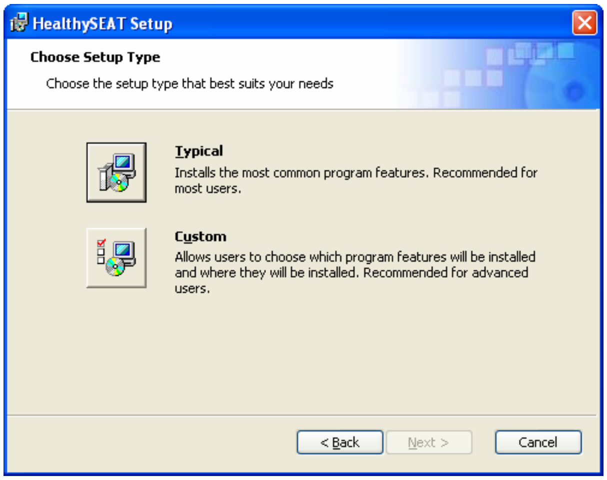
4. Read the End-User License Agreement, accept the terms, and click the "Next" button.



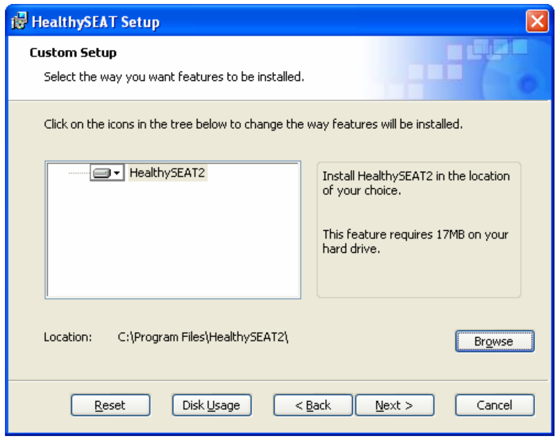
5. On the “Customer Information” screen, enter your name and the organization’s name in the appropriate fields and click the “Next” button.



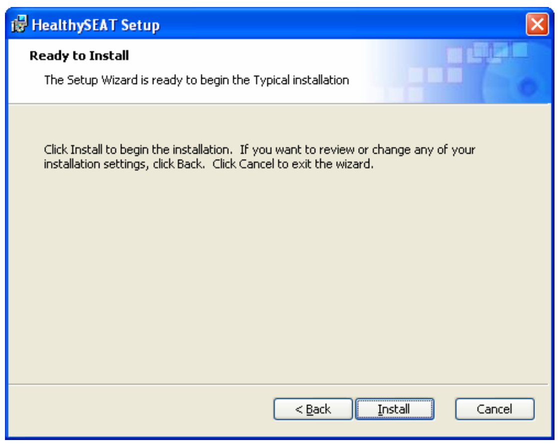
6. Select the preferred setup type, either “Typical” or “Custom.” The only difference is that the “Custom” installation allows the user to specify the location where the HealthySEAT application files are placed (the default location is c:\Program Files\HealthySEAT2\).



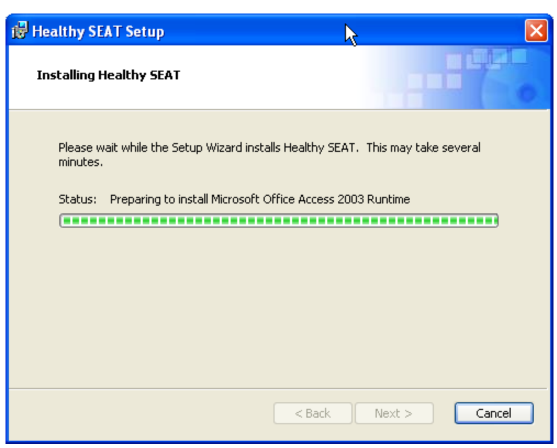
7. For the “Custom” setup type, use the “Browse” button to select the target installation folder, then press the “Next” button.



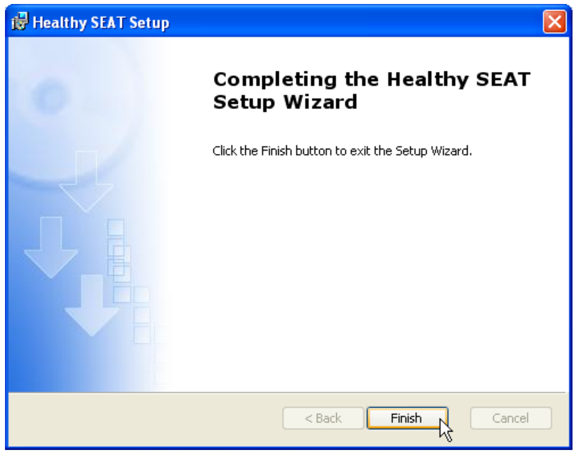
8. On the “Ready to Install” screen, click “Install”.



9. The status indicators will show the installation progress.



10. When Microsoft Office Access 2003 Runtime and HealthySEAT have been installed, the "Completing the HealthySEAT Setup Wizard" screen will appear. Click the "Finish" button, after which the Setup Wizard will close.



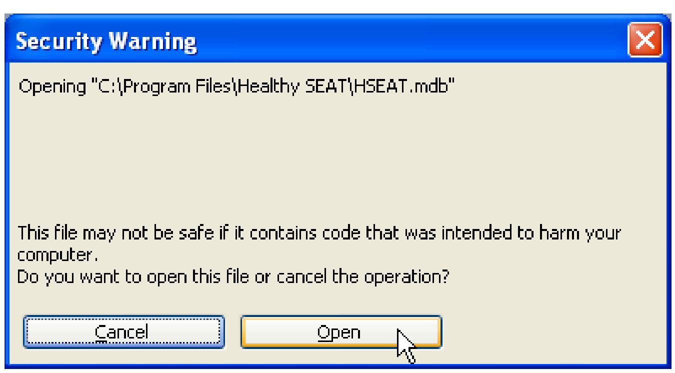
HealthySEAT is now installed, and an icon will appear on your desktop with the caption "HealthySEAT2." There is no need to re-start the computer prior to using the newly installed HealthySEAT. When ready to use the tool, merely double-click on the HealthySEAT2 icon.

2.4 Getting Started

When first running HealthySEAT after installation, the user will be required to enter a name and initials. This is part of the MS Access 2003 Runtime configuration.

The user may be presented with one or more security warnings from Microsoft, and some of these may appear each time HealthySEAT is opened. Following are some of the more common warnings, as well as instructions on how to respond.

- A warning may appear entitled "Security Warning: Unsafe expressions are not blocked." The user will be asked to confirm whether or not the file should be opened. The user should click the "Yes" button in order to proceed with opening the tool.



- A warning may appear saying that the file "may not be safe" and ask whether or not the user wants to take action. The user should click the "Open" button in order to proceed with opening the tool.

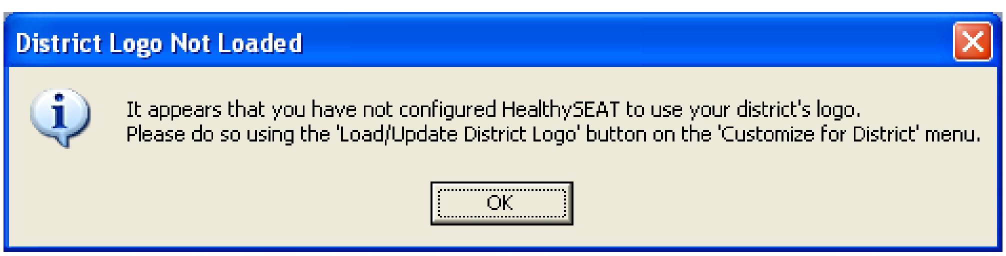
Error messages regarding graphics files may also appear. The following are some of the more common messages, as well as instructions on how to respond.

- If a message appears indicating that a specific .gif file cannot be opened, and the only button present is "OK," click the "OK" button.

- If a message appears indicating that the district logo (which by default is the EPA seal) cannot be loaded because it is too large, click the "OK" button. Most likely the user's computer cannot handle the default logo graphic type. After logging into HealthySEAT, this problem can be resolved by going to the "Load/Update District Logo" option on the "Customize for District" menu, clicking the "Browse" button, selecting "Image Files (*.bmp)" in the "Files of Type" field, selecting the HSEAT.bmp file shown or a copy of the district logo in .bmp format, and clicking the "Load/Update Logo" button. To verify the logo has been correctly inserted, click the "Save and Return to Customize for District" button to get back to the Customize for District menu and then click on the "Return to Main Menu" button to return to the Main Menu page of HealthySEAT. The district's logo should now appear in the upper left corner of the Main Menu page. Detailed instructions are also provided in Section 4.1.2 of this User's Manual.

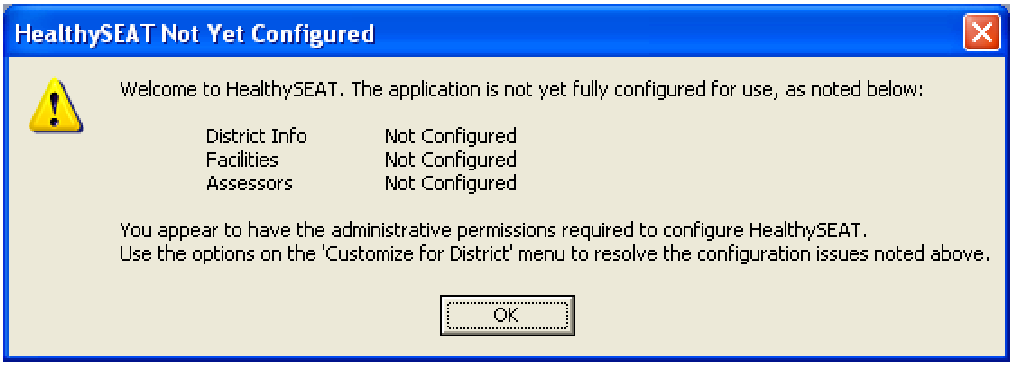
When opening HealthySEAT for the first time, HealthySEAT will automatically connect to the included empty database. As a result, the following warning messages will appear:

- "District Logo Not Loaded" (see screen below)



This message indicates that the current "back end" database has not been configured with the district's logo. Acknowledge this message by clicking the "OK" button. To prevent this message from recurring, follow the instructions in Section 4.1.2 to load your district's logo instead of the default EPA seal.

- "HealthySEAT Not Yet Configured" (see screen below)



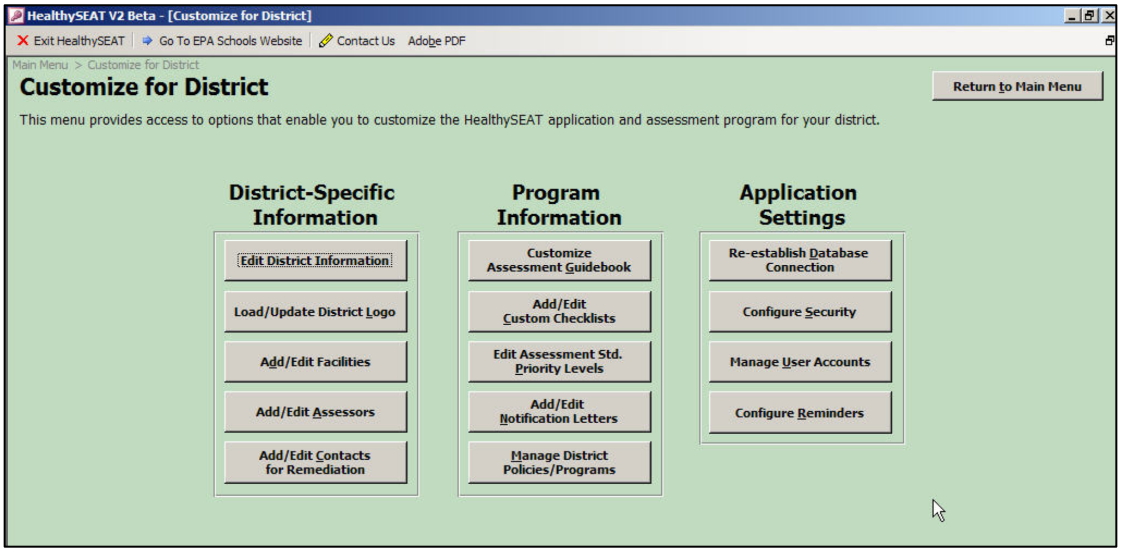
This message indicates that the current "back end" database is not yet configured for use. Click the "OK" button to acknowledge this message. It should stop appearing after login once you either (1) re-establish a connection to an existing fully configured database, or (2) input district information and at least one facility and one assessor.

NOTE: Do not be alarmed if you have installed a new version of HealthySEAT and have an existing database that is already configured. Simply use the "Re-establish Database Connection" option on the "Customize for District" menu to connect to the district's existing database (as described in Section 4.3.1 of this manual). Upon re-establishing the database connection the above warning messages should no longer appear when starting HealthySEAT.

Mandatory configuration steps required to start using HealthySEAT include:

- Edit district information (see Section 4.1.1 of this User's Manual)
- Load your district logo (see Section 4.1.2 of this User's Manual)
- Add facilities (see Section 4.1.3 of this User's Manual)
- Add assessors (see Section 4.1.4 of this User's Manual)

These configuration steps can all be accomplished by clicking on the "Customize for District" button on the Main Menu, then using the options under "District-Specific Information."



Additional recommended configuration steps, which can be accomplished using the other options on the "Customize for District" screen, include:

- Customize the assessment guidebook for the district (see Section 4.2.1 of this User's Manual).
- Create custom checklists for special purposes (see Section 4.2.2 of this User's Manual).
- Add/Edit the notification letters (see Section 4.2.4 of this User's Manual).
- Review the prioritization criteria and revise, if desired (See Section 4.2.3 of this User's Manual).
- Configure Security features (see Section 3, Section 4.3.2 and Section 4.3.3 of this User's Manual).

Section 3
Security Features

> **Reminder:**
>
> Make frequent copies of your data file (BE_HSEAT.mdb).

To help secure configuration and other data entered, HealthySEAT is equipped to provide selective access to various parts of the application. However, the use of the security features within HealthySEAT is entirely optional. Whereas in Version 1 security was enabled by default, new installations of HealthySEAT Version 2 come with security disabled by default. The information presented in this section should assist in deciding whether and how to use the security features available in HealthySEAT. To enable security in HealthySEAT, see Section 4.3.2 of this User's Manual. **Please read this section as well as section 4.3.2 carefully before enabling security as this will prevent you from inadvertently becoming locked out**.

3.1 Permission Levels

There are three permission levels that are fundamental to the security model employed by HealthySEAT. Each level ties directly to one or more of the three main components of HealthySEAT, as represented by the buttons on the Main Menu. Following are the three permission levels, along with the HealthySEAT components to which users of that level have access.

Permission Level	**Has Access To…**		
	Customize for District	Manage School-Specific Assessments	Open Reports/Output Menu
Administrator	✓	✓	✓
Assessor		✓	✓
Viewer			✓

3.2 Security Modes

To provide flexibility to users of HealthySEAT, three security modes are available. These three security modes include:

- Group Accounts (pre-configured)
- Individual User Accounts (recommended)
- No Security (default)

Each of these security modes is described in detail in the following subsections.

3.2.1 Using HealthySEAT with Group Accounts

Using this security mode involves setting up user accounts, and commensurate user levels, for groups of users, though HealthySEAT comes pre-configured with three group accounts. Individual users are provided the login credentials (User Name and

Password) for one of the three groups (e.g., Administrator, Assessor, Viewer) to which they belong.

The three group user accounts with which HealthySEAT comes pre-configured are:

User Name	Password	Permission Level
Admin	admin	Administrator
Assessor	assessor	Assessor
Viewer	viewer	Viewer

If security is enabled and HealthySEAT is used with these pre-configured group accounts, then the password for each should be changed (see Section 4.3.3 of this User's Manual).

NOTE: HealthySEAT passwords are fully encrypted. Administrator access to HealthySEAT is not possible without the login credentials for the "admin" group account. Thus, **it is recommended that the login credentials for the "admin" group account be written down and stored securely**.

3.2.2 Using HealthySEAT with Individual Accounts

HealthySEAT is capable of managing individual user accounts for each user. This is the security mode that is recommended, as it provides the highest level of protection. This mode involves setting up user accounts, and commensurate user levels, for each person who accesses HealthySEAT (see Section 4.3.3 of this User's Manual).

If HealthySEAT is used with individual user accounts, the default group accounts for Administrator, Assessor and Viewer (see Section 3.1) should be removed after the individual user accounts (including at least one with Administrator permission level) are established.

NOTE: HealthySEAT passwords are fully encrypted. Administrator access to HealthySEAT is not possible without the login credentials for at least one user account with permission level of "Administrator." Thus, **it is strongly recommended that the login credentials for at least one user account with permission level of "Administrator" be written down and stored securely.**

3.2.3 Using HealthySEAT with No Security

HealthySEAT can be used with all security features disabled. To minimize the barriers to installing and evaluating HealthySEAT, new installations of Version 2 come with this security mode selected by default. In this mode, there is no prompt for User Name or Password when opening the tool. All users are treated as administrators and have full access to all functions within HealthySEAT, including the "Customize for District" menu.

The district is encouraged to consider the value of the HealthySEAT data and the effort put into customizing the district's assessment program and configuring it properly.

Therefore, **it is not recommended that HealthySEAT be deployed with security features disabled unless the tool is used on one single computer**.

To disable security in HealthySEAT, see Section 4.3.2 of this User's Manual.

Section 4
Customize for District

Reminder:

Make frequent copies of your data file (BE_HSEAT.mdb).

The first step in using HealthySEAT is to customize the tool with District-specific information, including:

- District name, address, and contact information, and Logo
- Information about all school facilities within the district, including contact information
- District assessors and contacts for remediation
- Areas/topics the district would like to assess at each school facility
- Custom assessment checklists, including those for special purposes
- Notification letters (standard and custom), which are sent to each facility prior to, and immediately following assessments, tailored to the district's needs.
- Security and user configurations

Detailed instructions for completing the customization process are provided below.

HealthySEAT Customization by State Agencies

EPA recognizes that agencies such as state health, education, environment, transportation and numerous other departments offer guidance and resources to assist school districts with compliance with state regulations and recommendations. Therefore, HealthySEAT has been designed to be flexible and expandable to facilitate states downloading and customizing the content included in the tool. While content included in HealthySEAT primarily introduces and guides school districts to federal EPA program information, the flexibility of HealthySEAT allows states the opportunity to edit and/or add in state guidance and requirements.

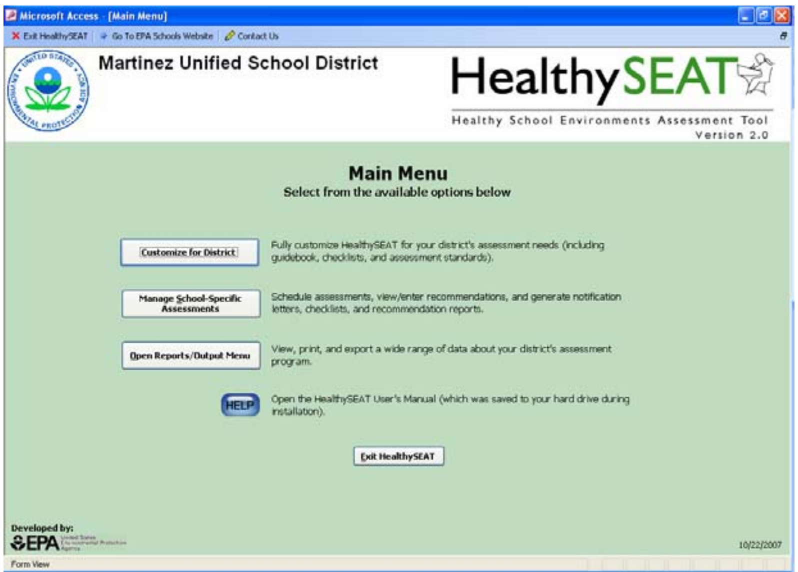
States agencies interested in customizing content within HealthySEAT are encouraged to collaborate across all state departments interacting with school districts. States can follow the same customization process outlined in Section 4.2.1 below, prepare PDF versions of the state-customized guidebook and checklist, and then distribute the customized guidebooks and checklists to school districts and private school organizations within the state's jurisdiction. School districts and private school organizations will then be able to further customize HealthySEAT to create assessment programs reflecting federal, state and local level regulations and recommendations.

4.1 District-Specific Information

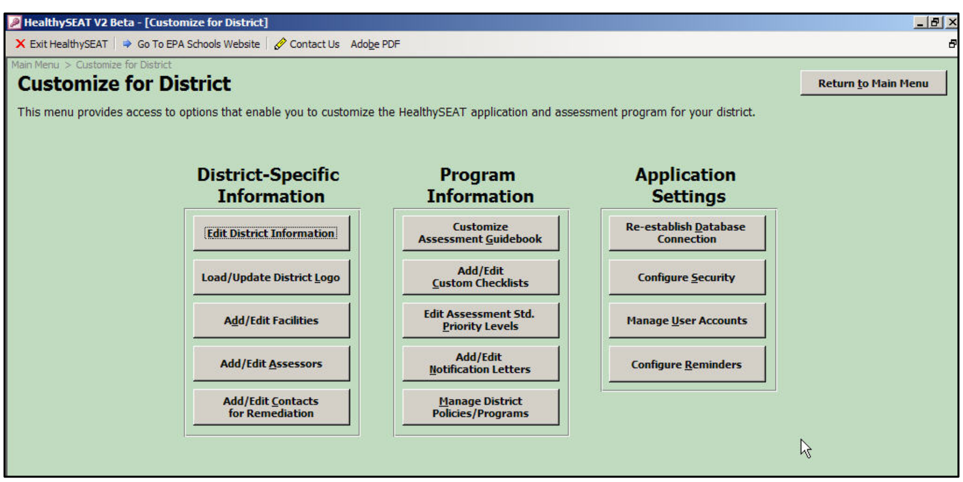
The following features of HealthySEAT allow districts to enter in district- and facility-specific information.

4.1.1 Edit District Information

Entering district information customizes the title at the top of the main menu page of the tool and enables the software to generate reports and forms with the district's customized contact information included on the letterhead.

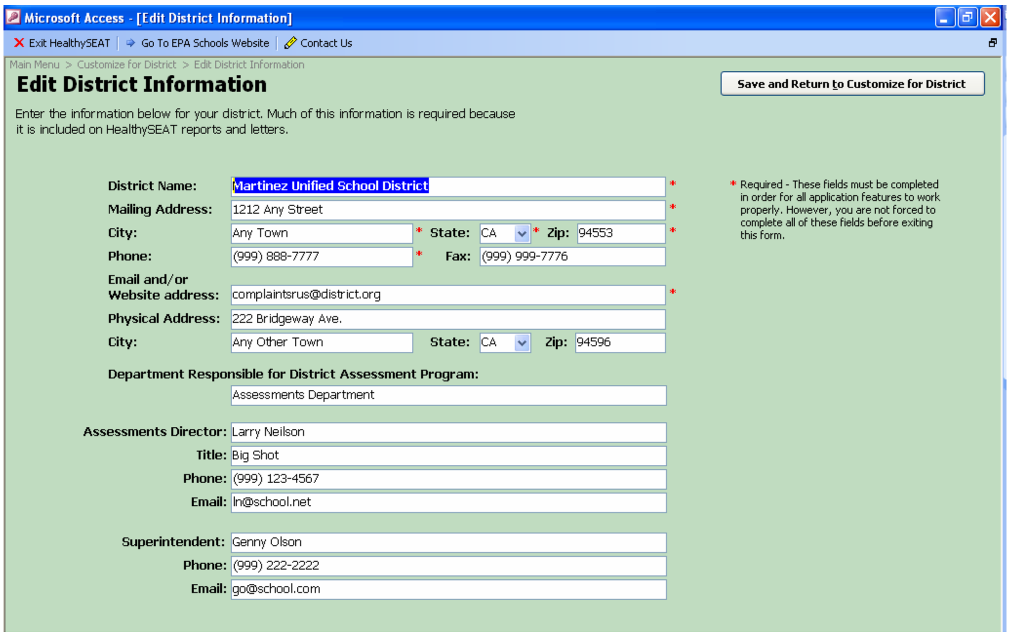


1. From the main menu, click on the "Customize for District" button.



Click on the “Edit District Information” button.

In the corresponding mandatory fields (marked with a red asterisk), enter the district’s name, address, and phone number.



In the other fields, enter a fax number, the department responsible for assessments (assessments department), the name of the director responsible for assessment oversight (assessments director), assessments director’s title, and the name of the district Superintendent.

2. Once all the fields are completed, click on the “Save and Return to Customize for District” button to return to the Customize for District menu.

3. If the “Save and Return to Customize for District” button is clicked before information is entered in the required fields, the “Main Menu” application title and other branded application output may not have the district’s name.

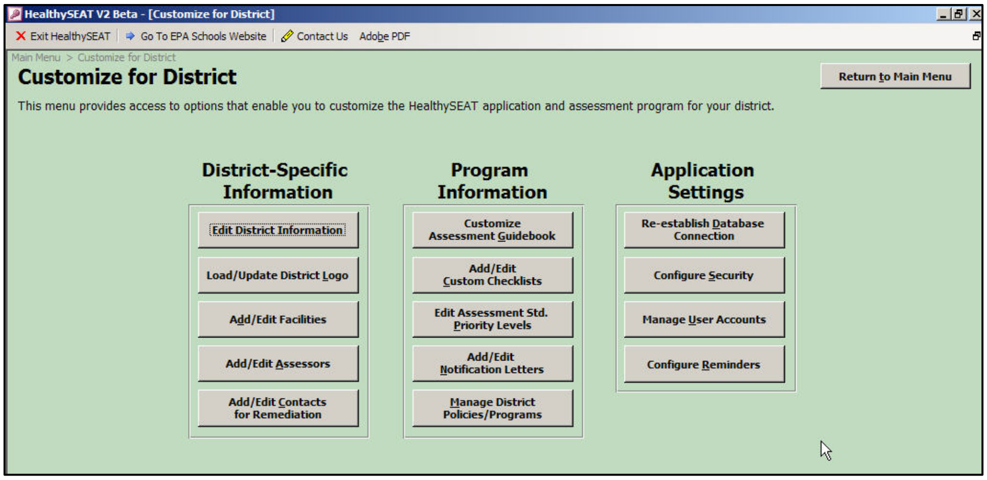
4. Click on the “Return to Main Menu” button. The customized district name should now appear on the Main Menu page.

4.1.2 Load/Update District Logo

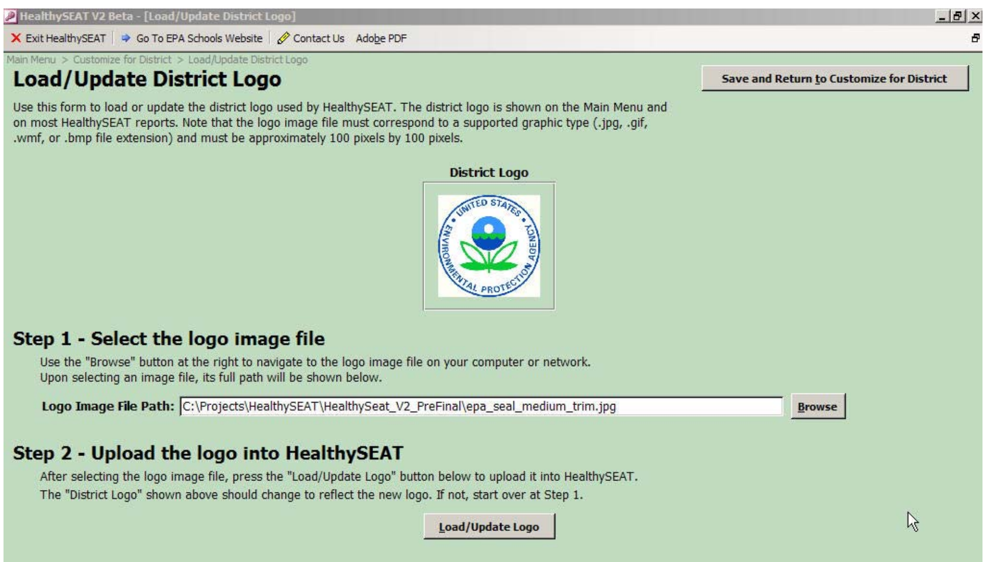
Since HealthySEAT is intended to reflect the district’s own program content, districts should display their own logo in the tool and on notification letters and reports generated by HealthySEAT. The district logo will appear on the left-hand corner of the Main Menu page in the database and on most of the reports generated by HealthySEAT.

Identify the logo that the district would like to incorporate into the tool. The logo image file should correspond to a supported graphic type (.jpg, .bmp, .gif, .wmf) and be sized approximately 100 pixels by 100 pixels.

1. From the Customize for District menu, click on the "Load/Update District Logo" button.



2. Click the Browse button next to the file path name. The logo's file pathway should appear.



3. Click on the "Load/Update Logo" button. A preview of the logo will be displayed in the "Logo Preview" box.

4. To verify that the logo has been incorporated into the tool, click on the "Save and Return to Customize for District" button. Then click on the "Return to Main Menu" button. The logo should appear in the upper left-hand corner of the screen.

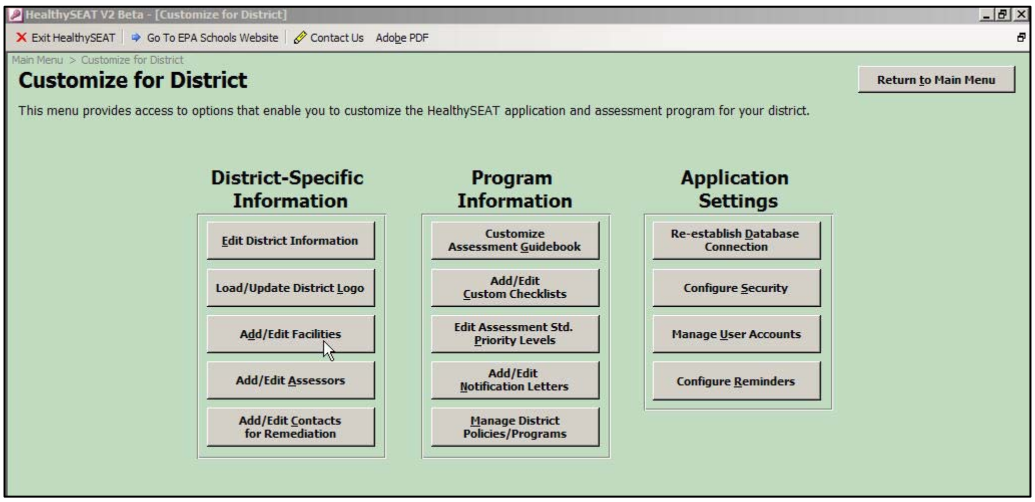
5. If an incorrect logo appears, verify that the logo image file corresponds to a supported graphic type (.jpg, .bmp, .gif, .wmf) and is sized approximately 100 pixels by 100 pixels. Repeat steps 2 through 6 above.

4.1.3 Add/Edit Facilities

This feature allows districts to add new facilities and/or edit or delete information on existing facilities currently stored in the tool. The facility drop-down list and the facility selector arrows at the top of the screen allow users to page through the names of the facilities one at a time or jump to the beginning or end of the list. Note that fields marked with a red asterisk are required while field marked with a green asterisk are recommended

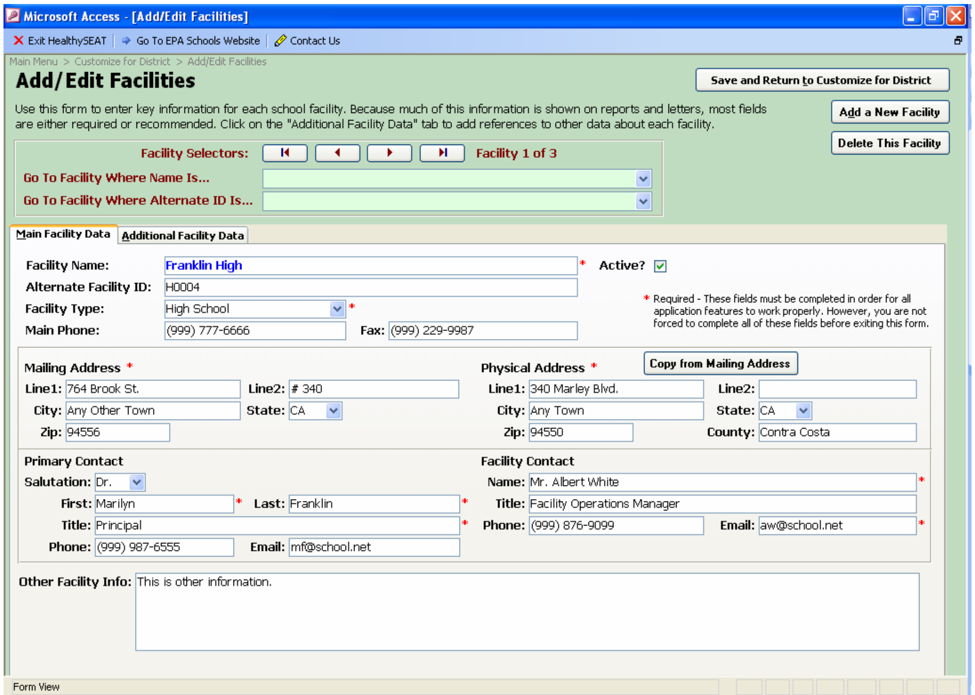
To add new facilities, complete the following steps:

1. Access the Customize for District menu from the Main Menu page.



2. Click on the "Add/Edit Facilities" button. The screen will automatically show the "Main Facility Data" page.

3. Enter the name of the facility. This field must contain text before information can be entered into the remaining fields.



4. If applicable, enter an Alternate Facility ID. This field can be used to address multi-use facilities with multiple administrators (i.e. a traditional day time high school and an evening continuation high school that are both on the same campus but have different principals).

5. Enter the type of facility on the field to display the drop-down list. The options include:

- *Multi-use*: multiple facilities at one location such as a middle school and a high school on the same campus
- *Elementary school*: as defined by the district
- *Middle school*: as defined by the district
- *High school*: as defined by the district
- *Bus depot*: location where the school bus fleet is parked
- *Administration*: administrative offices such as the School District headquarters
- *Industrial*: various vocational schools, chemical storage facilities, etc.
- *Career/Vocational*: as defined by the district
- *Other*: facilities that are not described by the categories listed above

6. Enter the Mailing Address and the Physical Address (which may differ). Line 2 may include information such as mail stop and location identifiers. Note that letters are all sent to the mailing address

7. Enter the phone number and fax number.

8. Enter the primary contact's name, title, and email address (e.g., person with overall responsibility for that school or facility such as the principal).

9. If the facility contact is different from the primary contact, enter the name of the facility contact (e.g., person with overall responsibility for school operations and facility management such as the head of facilities or the head custodian).

10. The "Other Facility Information" field is provided to allow entry of optional additional information on the facility such as building square footage, enrollment, capacity, etc.

11. Note that the "Active?" checkbox is checked by default, indicating that the facility is currently active, or being used, and thus is included in the assessment program. If the facility is inactive (i.e. a closed school), click on the box to toggle off the checkmark. NOTE: the option to "delete" a facility exists, however it is recommended that this button be used cautiously. In the event that a facility is closed, toggling off the checkmark in the "Active?" checkbox is recommended instead of deleting the facility. This will retain the historical records of assessments conducted at the facility. In the event the facility is demolished and the district no longer needs the historical record of assessments, the "delete" button can be used.

12. Upon entering all information for the facility, either click on the "Add Facility" button to enter additional facilities, or, if finished entering facility information, click on Save and Return to Customize for District.

13. Repeat steps 3 through 12 above until all facilities are entered into the database. NOTE: Districts are free to develop their own programs to import facility information from existing databases. See Section 7.3 of this User's Manual for more information.

14. To verify that the new facilities have correctly been entered and saved in the database, click on the down arrow in the "Facility Name Search" field to display the drop-down list. The new facilities should appear in the drop-down list. If an alternate facility ID has been entered, click on the down arrow in the "Alternate Facility ID" field to display the pull-down menu. Verify that the new facility IDs appear in the pull-down menu.

15. The HealthySEAT database also provides an option to create an index for additional facility data such as financial tracking information, photos from assessments, site plans of schools, work order numbers, and more. To create an

index, click on the "Additional Facility Data" tab. See Section 8.3 of this user's manual.

16. Enter a reference number, a location where the data can be found (i.e. assessment photos are located in file drawer X), a description of the data, and a sort order (order of appearance in the index).

17. Click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

To edit an existing facility, complete the following:

1. Access the Customize for District menu.

2. Click on the "Add/Edit Facilities" button.

3. Choose the name of the facility from the Facility Search drop-down list or by using the facility selectors.

4. Once the facility information has appeared on the screen, click in the corresponding text field(s) to enter new information.

To delete an existing facility, complete the following:

1. Access the Customize for District menu.

2. Click on the "Add/Edit Facilities" button.

3. Choose the name of the facility to be deleted from the Facility Search drop-down list or by using the facility selectors at the bottom of the screen.

4. Click on the "Delete Facility" button. The following warning message will appear: "Are you sure you want to delete this facility and it's associated assessments?" Deleting a facility will remove all of the details associated with the facility, including past assessment results.

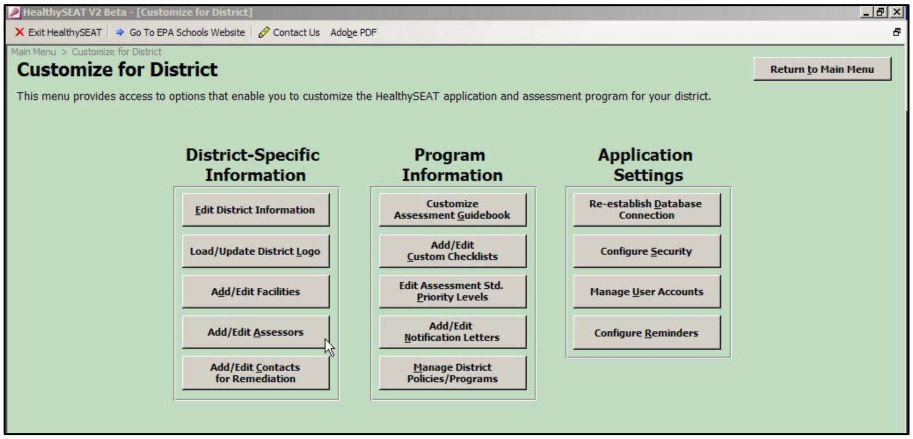
5. To continue with deleting the facility, click on the "Yes" button.

6. Click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

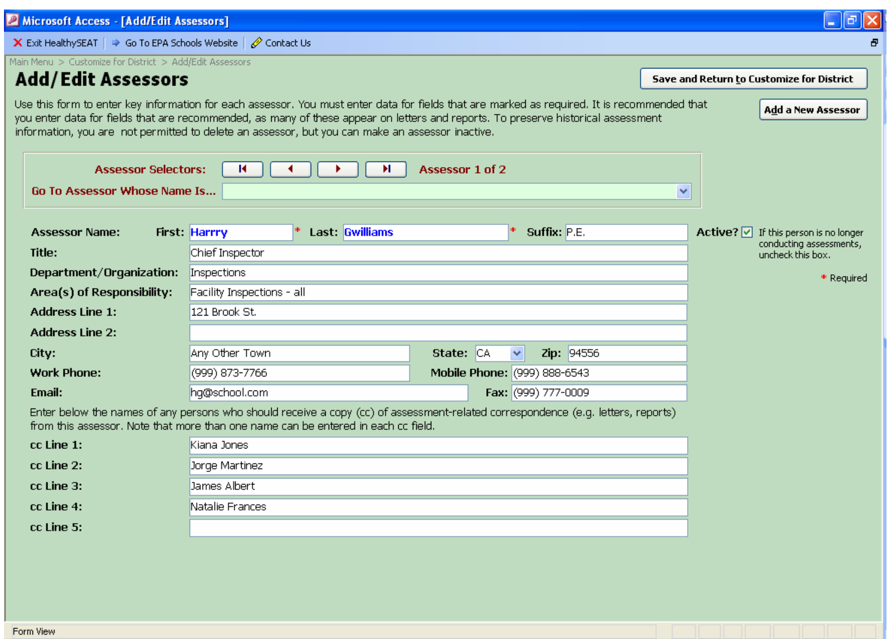
4.1.4 Add/Edit Assessors

The "Add/Edit Assessor" function of the tool customization allows users to add new facility assessors and edit information on existing facility assessors. A facility assessor can be any person the district designates to conduct assessments. The "Assessor Search" pull down menu at the top of the page allows users to quickly select an assessor for which information has already been added. The "Assessor Selector" arrow buttons at the bottom of the screen allow users to page through the names of the facility assessors one at a time or jump to the beginning and/or end of the list.

1. From the Customize for District menu, click on the "Add/Edit Assessors" button.



2. Enter the name of the assessor, a suffix (e.g., CIH1234) if applicable, the assessor's title, department, address, phone number, fax number, and email address.



3. In the "cc" fields, enter the name(s) of persons who should receive copies (cc) of assessment related correspondence (i.e. letters, reports) with individual schools. Note that on letters, the facility contact will always appear as the first "cc."

4. Note that the "Active Assessor?" checkbox is checked by default, indicating that the assessor is currently conducting assessments. If the assessor is no longer

conducting assessments, click on the box to toggle off the checkmark. NOTE: Assessors cannot be deleted from the database because doing so could potentially orphan assessment records linked to that assessor. While editing of assessor names is permitted, DO NOT abuse this feature by "re-using" inactive assessor records for a new assessor, as this could result in old assessment records being linked to the new assessor.

5. To add the next assessor, click on the "Add a New Assessor" button. The fields will appear blank to allow additional assessors to be entered.

6. Repeat steps 2 through 5 until all assessors, and their respective contact information, are entered into HealthySEAT.

7. To verify that the new assessors have been entered, click on the down arrow in the "Assessor Search" field to display the drop-down list. The new assessors should appear in the drop-down list.

8. To edit information on an assessor previously entered, select the name from the "Assessor Search" pull down menu at the top of the screen. Refer to steps 2 through 7 above.

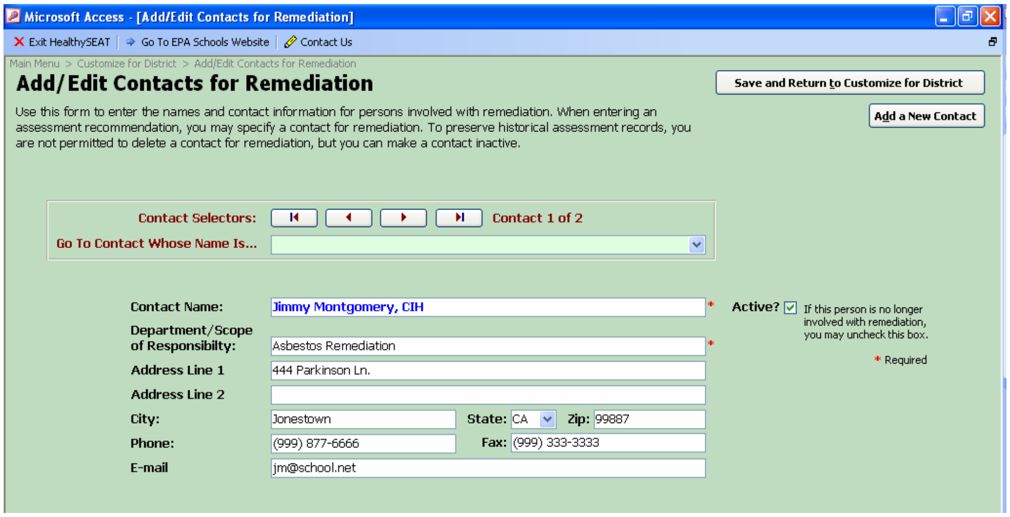
9. When finished entering facility assessor information, click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

4.1.5 Add/Edit Contacts for Remediation

The "Add/Edit Contacts for Remediation" function of the tool customization allows users to add new contact information for remediation contacts and/or responsible entities within the district as well as edit information on existing remediation contacts and responsible entities. Remediation contacts are responsible individuals within the district who are responsible for addressing, resolving and/or implementing assessment recommendations. Examples include asbestos, lead, and mold abatement departments and staff, Integrated Pest Management/ landscaping staff, facilities directors, maintenance staff, and/or district Indoor Air Quality (IAQ) and heating, ventilation, and air conditioning (HVAC) specialists. NOTE: This feature is entirely optional. Districts may use the feature to identify who within the district should be contacted by the assessor regarding any problems found. If the district prefers not to include contacts for remediation, it will not affect other functions of the database.

The "Contact Search" drop-down list at the top of the page allows users to quickly select a remediation contact for which information has already been added. The "Contact Selector" arrow buttons at the bottom of the screen allow users to page through the names of the remediation contacts one at a time or jump to the beginning and/or end of the list.

1. From the Customize for District menu, click on the "Add/Edit Contacts for Remediation" button.



2. In the corresponding required fields (marked with a red asterisk), enter the remediation contact and the contact's department or scope of responsibility.

3. In the corresponding optional fields, enter the remediation contact's address, phone number, fax number, and email address.

4. Note that the "Active?" checkbox is checked by default, indicating that the remediation contact is currently providing remediation oversight and/or services. If the remediation contact is not currently providing remediation services, click on the box to toggle off the checkmark.

5. To enter additional Contacts for Remediation, either click on the "Add Contact" button or use the right selector arrow to page to a blank screen. The fields will appear blank to allow additional contacts to be entered.

6. To verify that the new contact has been entered, click on the down arrow in the "Contact Search" field to display the drop-down list. The new contact should appear in the drop-down list.

7. To edit information on a contact previously entered, select the name from the "Contact Search" pull down menu at the top of the screen. Refer to steps 2 through 6 above.

8. Once the facility assessor information has been entered, click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

4.2 Program Information

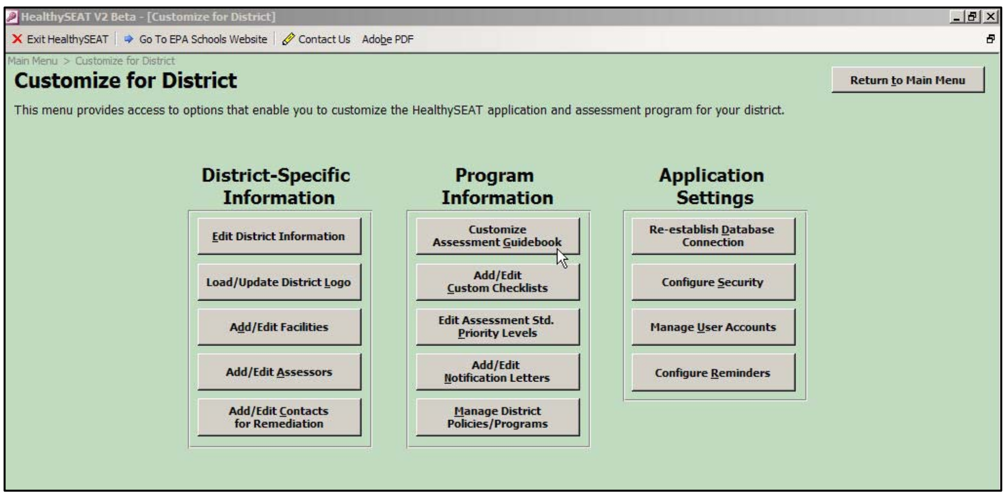
The following features of HealthySEAT allow districts to customize the content associated with their district-specific assessment program.

4.2.1 Customize Assessment Guidebook

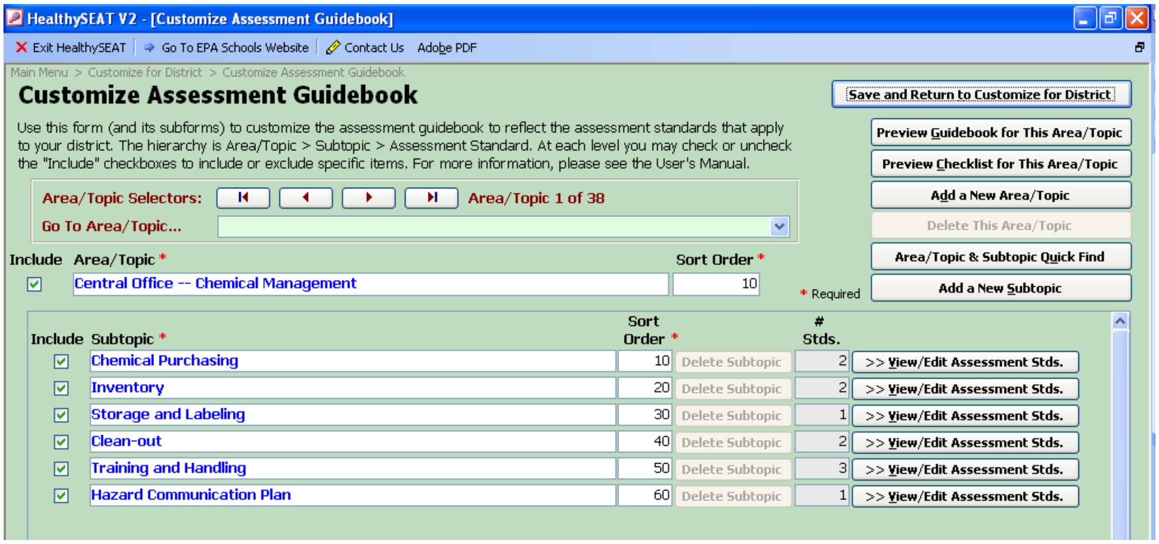
The guidebook is a complete reference handbook that includes the areas/topics, subtopics, assessment standards, types of actions (i.e., regulatory requirement or recommendation), priority levels, guidance for assessors, importance, background information, and links to references and detailed guidance. Content in the guidebook identifies each area and topic addressed in the tool, identifies EPA and other federal agency programs, explains the benefits of implementing the programs, and provides specific links to program resources. Use the following steps to customize the assessment guidebook to reflect the assessment standards that apply to your district:

1. Access the Main Menu and click on the "Customize for District" button.

2. Click on the "Customize Assessment Guidebook"" button.



3. The screen will display the default areas/topics and subtopics suggested by EPA for inclusion in the district's guidebook and checklist. All EPA areas/topics and subtopics are checked for inclusion by default.



4. To customize the content to be included in the guidebook and checklist, the user can check or uncheck the boxes under "Include" next to each area/topic and subtopic. To include an area/topic or subtopic in the district's assessment program, check the box. To omit an area/topic or subtopic from the district's assessment program, uncheck the box. If an attempt is made to omit an area/topic or subtopic that includes assessment standards that may be regulatory, the following message will appear: "This [area/topic or subtopic] contains at least one assessment standard that may be a regulatory requirement. Are you sure that you want to remove it from your program?"

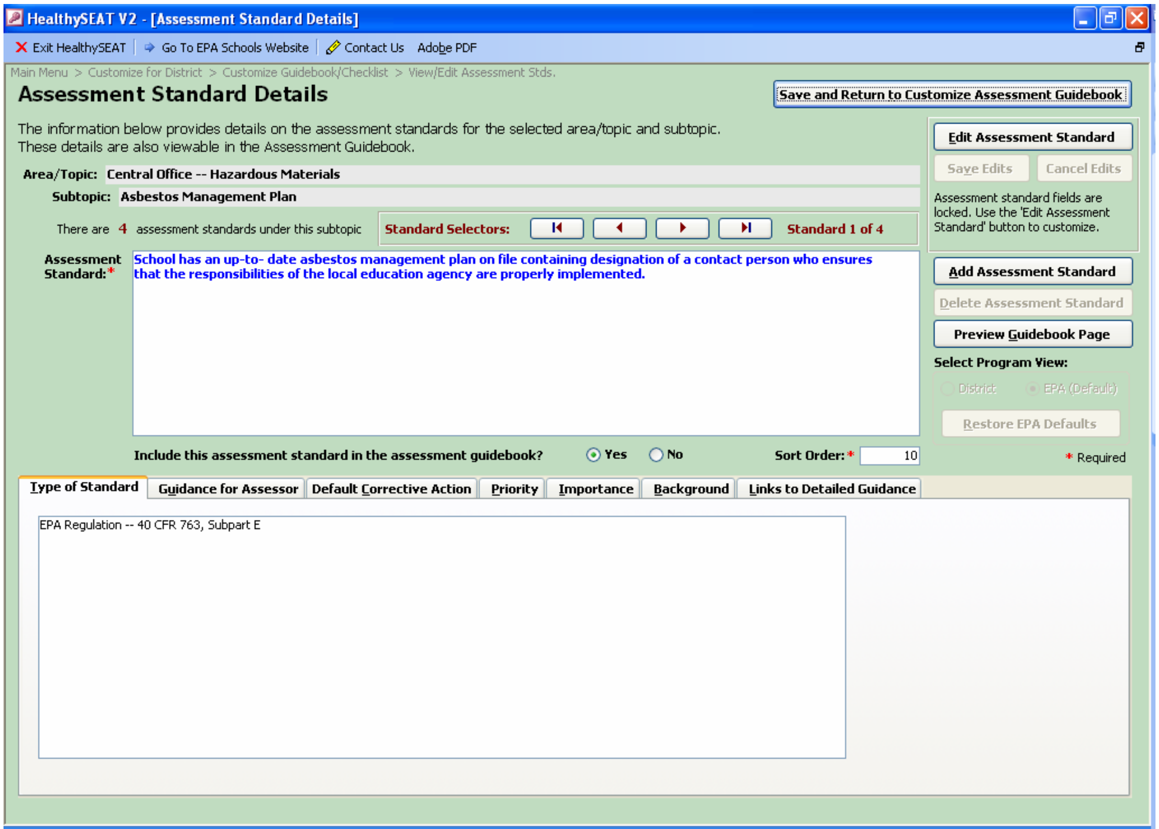
5. Note that the "Delete Area/Topic" and "Delete Subtopic" buttons do not apply to the areas/topics and subtopics that originate with EPA. EPA areas/topics and subtopics cannot be deleted. However, the user can omit an EPA area/topic or subtopic from the guidebook by un-checking the "Include" box as described in step 4 above.

6. To scroll through each area/topic and view the associated subtopics, use either the "Area/Topic Selectors" at the top of the page or, to go directly to a specific area/topic, use the "Go To Area/Topic…" drop-down list at the top of the page.

7. Users have control over the order in which areas/topics, subtopics, and assessment standards appear in the guidebook and checklist. The ordering is ascending and is controlled by the respective numeric Sort Order fields. Area/Topic Sort Order is relative to other areas/topics only. Subtopic Sort Order is relative to the other subtopics within the same area/topic only. Assessment Standard Sort Order is relative to the other assessment standards within the same subtopic only. While sort order values are pre-set by default, these can be edited to suit district preferences.

8. To view the assessment standards within a particular subtopic (the number of which is indicated in the "# Stds." Text box), click on the ">> View/Edit

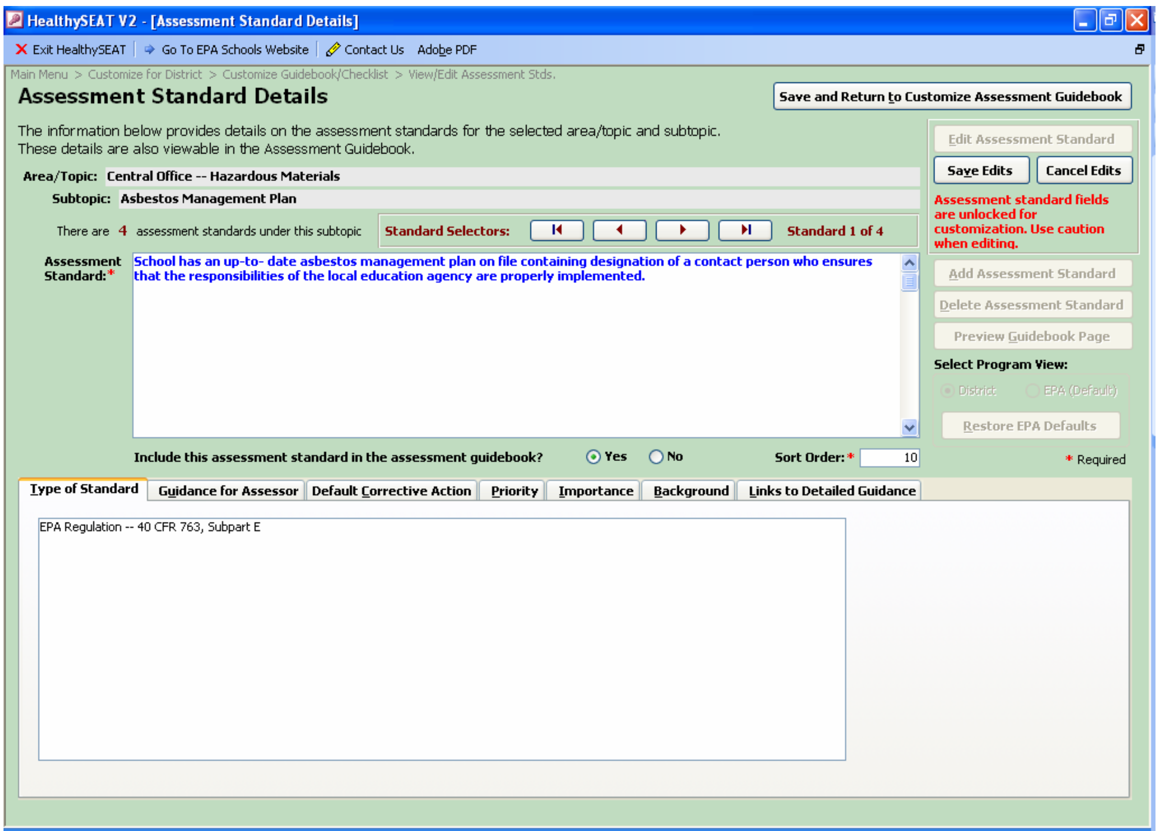
Assessment Stds." button to the right of the subtopic, which brings up the Assessment Standard Details page. The Assessment Standard Details page provides complete details for the assessment standards within the subtopic. To cycle through multiple assessment standards, use the Standard Selectors.



9. Also listed on the Assessment Standard Details page are the Type of Standard, Guidance for Assessor, Default Corrective Action, Priority, Importance, Background, and Links to Detailed Guidance. Each of these additional resources can be viewed by clicking on the corresponding tabs on the bottom half of the page. Each of these provides additional resources and information related specifically to the assessment standard. Regarding Default Corrective Action, which is new in Version 2, any text placed in this field will pre-populate the Problem Description/Corrective Action field on recommendations created for this assessment standard.

10. The user can choose to either include or exclude an assessment standard in the district's assessment program by clicking on "Yes" or "No" next to the question "Include this assessment standard in the assessment guidebook?" To include an assessment standard, click on "Yes". To omit an assessment standard, click on "No". Note that this selection is not considered an edit to the assessment standard, so it can be made without clicking on the "Edit Assessment Standard" button.

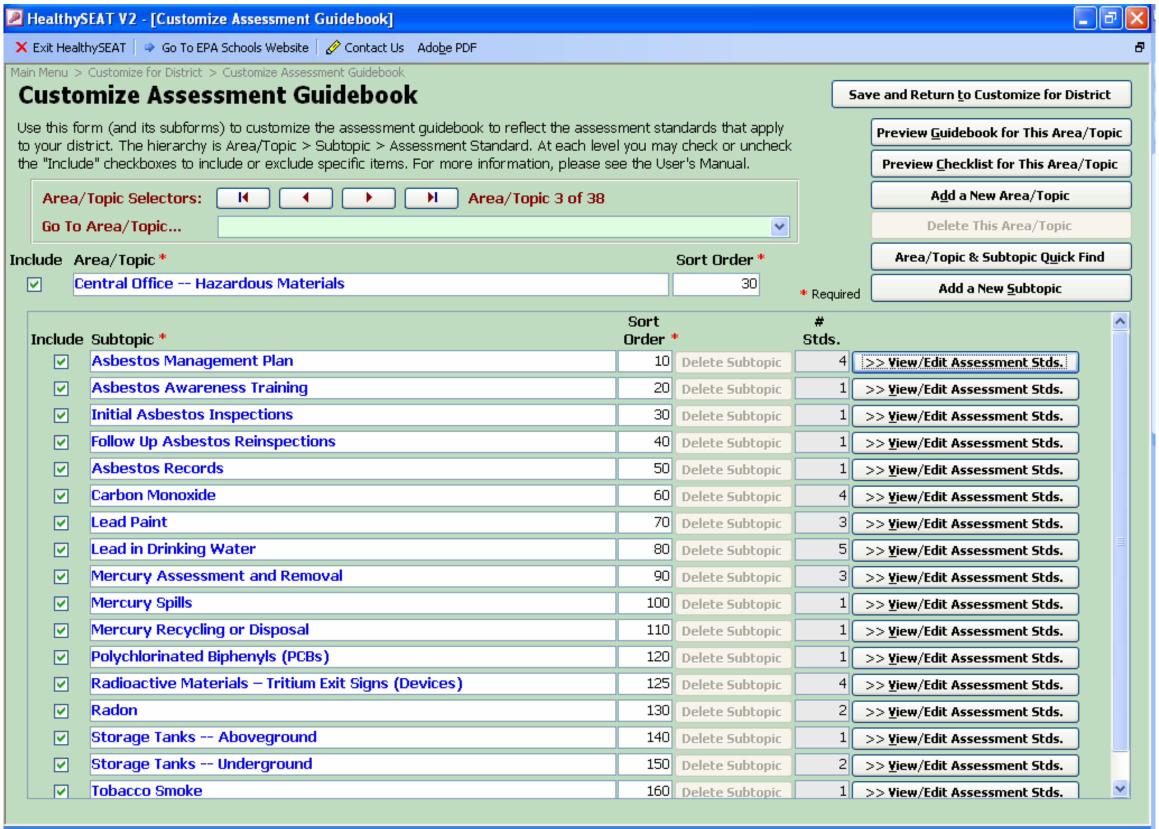
11. The user can edit the content of any assessment standard, including the type of standard, guidance for assessor, default corrective action, priority, importance, background, and links. To make edits, click on the "Edit Assessment Standard" button. The following warning message will appear: "Assessment standard fields are unlocked for customization. Use caution when editing." Click in the corresponding field to add and/or edit text. In most of the large text fields, pressing the Enter key will cause a new line to begin. Cut and paste is also fully functional. When edits are complete, the user should click the "Save Edits" button. To cancel edits and revert to the last saved version, the user should click the "Cancel Edits" button.



12. Upon editing an assessment standard that originated with EPA, the user will notice that in the "Select Program View" box, the active selection switches from "EPA (Default)" to "District." After editing the assessment standard, the user can revert back to the original EPA text by clicking on the "Restore EPA Defaults" button.

13. The user may preview of the guidebook page(s) for the assessment standard by clicking on the "Preview Guidebook Page" button. This feature provides a preview of the guidebook page(s) that relate to the assessment standard, including its context within the selected area/topic and subtopic. The resulting guidebook page(s) include all assessment standards within the selected area/topic and subtopic.

14. When finished customizing the content for each assessment standard, click on the "Save and Return to Customize Assessment Guidebook" button to save any unsaved changes and return to the main "Customize Assessment Guidebook" page.



15. From the "Customize Assessment Standard" page, the user may preview the guidebook content for the current area/topic by clicking the "Preview Guidebook for this Area/Topic" button. The resulting guidebook page includes all subtopics and assessment standards associated with the area/topic.

16. The user may also preview a checklist for the current area/topic by clicking the "Preview Checklist for this Area/Topic" button. The resulting checklist includes all subtopics and assessment standards associated with the area/topic.

17. To quickly view/print a list of all areas/topics and subtopics currently included in the district's program, use the "Area/Topic & Subtopic Quick Find" button.

18. To print a complete guidebook or master checklist, return to the Main Menu, click on the "Open Reports/Output Menu" button, then select the program-level reports entitled "Assessment Guidebook" or "Master Checklist," respectively. Select the output format (i.e. Print Preview, Text, Excel, RTF, or HTML) and click the "Generate Report/Output" button.

Users can further customize the guidebook by **adding** or **deleting** district-specific areas/topics, subtopics, and assessment standards. To add new areas/topics, subtopics and assessment standards, complete the following steps:

1. From the Main Menu, click on the "Customize for District" button.

2. Click on the "Customize Assessment Guidebook" button.

3. To add a new **area/topic**, click on the "Add a New Area/Topic" button, the enter an appropriate name for the area/topic. By default, the Area/Topic text will set to "…New…", but this should be replaced with the actual area/topic name desired. For example, the district may choose to add a campus security area/topic. Thus, the user would enter "Campus Security" into the Area/Topic text field.

4. Areas/Topics that are added by the district may be deleted by clicking on the "Delete This Area/Topic" button, which will only be active when appropriate. The user may not delete areas/topics that originate with EPA, although these can be omitted from the program by un-checking the "Include" check box.

5. To add new **subtopics** to either an existing area/topic or a newly added area/topic, click on the "Add a New Subtopic" button. By default, the Subtopic text will be set to "…New…", but this should be replaced with the actual subtopic name. For example, "Campus Perimeter" and "Entrances and Exits" may be two subtopics of the "Campus Security" area/topic.

6. Subtopics that are added by the district may be deleted by clicking the subtopic, then clicking on the "Delete Subtopic" button, which will only be active when appropriate. The user may not delete subtopics that originate with EPA, although these can be omitted from the program by un-checking the "Include" check box.

7. To add new **assessment standards** to a subtopic, first select the subtopic, then click the ">> View/Edit Assessment Stds." button. This will bring up the "Assessment Standard Details" screen. Click the "Add Assessment Standard" button, which makes all fields available for editing. By default, the "Assessment Standard" text field is set to "…New…", but this should be replaced with the actual the condition the facility assessor should be looking for at the school facility. For example, to direct an assessor to check for visitor access procedures, under the "Entrances and Exits" subtopic created above the user might add an assessment standard that reads "Visitor access is controlled through a particular point or entrance." To be consistent with EPA assessment standards, assessment standards added by the district should be written such that a positive condition is described, and that the desired response by an assessor during a site visit is affirmative that the standard is being met. To the extent possible, assessment standards should allow the assessor to determine the optimal "yes" answer in an objective and practical manner.

8. Click on the “Type of Standard” tab. In the text field, enter state and/or district regulations and policies that pertain to the assessment standard.

9. Click on the “Guidance for Assessor” tab. Enter specific directions for the facility assessor guiding him or her in determining if assessment standard is being met. For example, for the assessment standard added in Step 7 above, this field should direct the assessor to determine if access by visitors is managed through a specific point.

10. Click on the Default Corrective Action tab (new in Version 2) and enter any standard direction to provide to facility managers when the assessment standard is not being met. The text entered here will pre-populate the “Problem Description/Corrective Action” field on all recommendations created based on this assessment standard. This field is optional. If the district prefers to have assessors provide direction specific to each recommendation, then there is no need to enter any text in this field. Standards that originate with EPA do not, by default, contain text for this field.

11. Follow the procedures outlined in Step 11 above to enter and save text. Note that since such standards do not originate with EPA, the Select Program View box will always show “District” as the selected view, and the “Restore EPA Defaults” button will be inactive.

12. The user may also delete district-specific assessment standards using the “Delete Assessment Standard” button, which is active when appropriate. If recommendations exist that are linked to the assessment standard, the user will be warned of this, and asked to confirm the deletion. If confirmed, the deletion will result in the deletion of the assessment standard and any recommendations that are related to it.

13. To add assessment standards and associated resource information for newly-added areas/topics and subtopics, click on the “View/Edit Assessment Stds.” button. Note that the area/topic and subtopic entered on the previous screen now appear. Next click on the “Add Assessment Standard” button.

14. In the “Assessment standard” field, enter the condition the facility assessor should be looking for and where to look at the school facility. The assessment standards will appear on the checklist to guide the facility assessor through the assessment. For example, if the user would like to direct the assessor to check for visitor access procedures, the user might enter, “Visitor access is controlled through a particular point or entrance.”.” Assessment standards should be written such that the desired answer is “yes,” or affirmative to be consistent with all other assessment standards included in the tool. To the extent possible, assessment standards should allow the assessor to determine the optimal “yes” answer in an objective and practical manner.

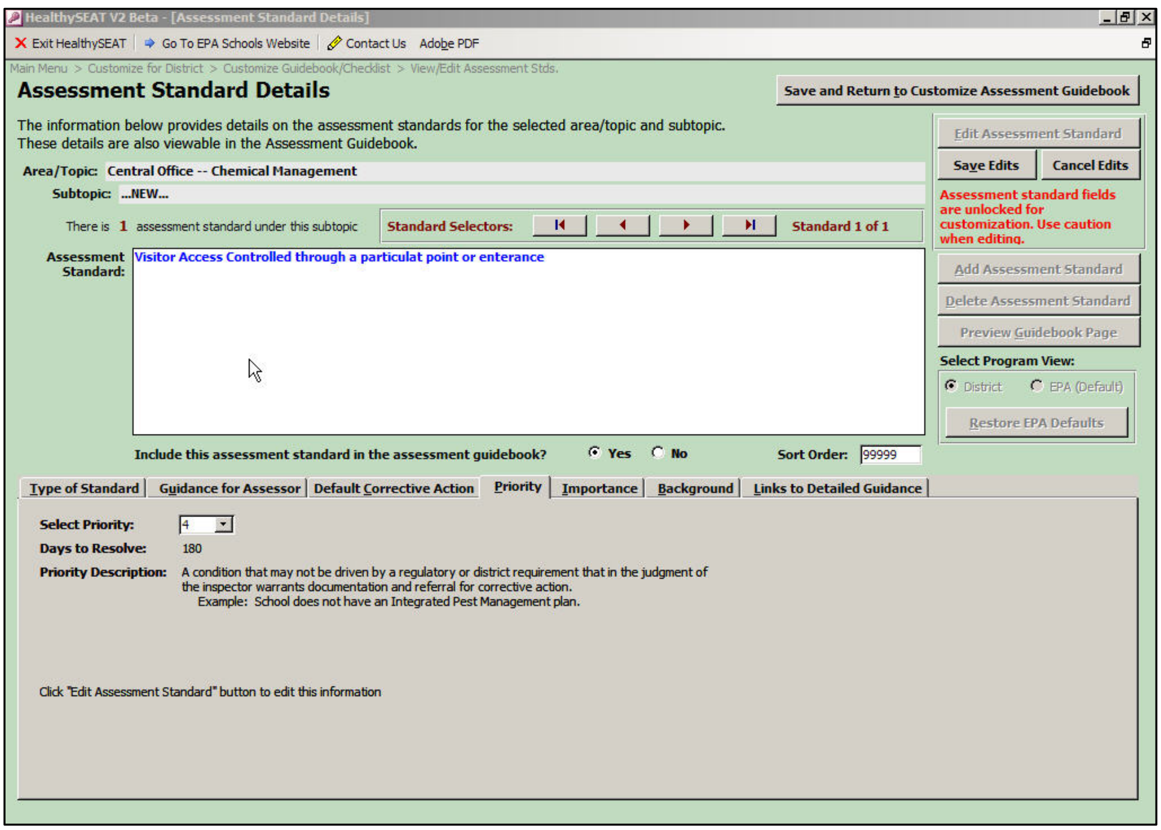
15. Click on the “Type of Standard” tab. In the text field, enter state and/or district

regulations and policies that pertain to the assessment standard.

16. Click on the "Guidance for Assessor" tab. Enter specific directions for the facility assessor guiding him or her in determining the appropriate response for the assessment standard. For example, if the subtopic is "entrances and exits," this field should direct the facility assessor to determine if access by visitors is managed through a specific point.

17. Click on the Default Corrective Action tab and enter any information that should wish to appear on the form when a recommendation is created based on this assessment standard.

18. Click on the "Priority" tab. Select the appropriate priority number (1 through 4) from the pull-down menu. Included in the pull-down menu is guidance on the recommended number of "Days to Resolve" the recommendation. Upon selecting the priority, a definition of the priority number appears in the "Priority Description" field. To customize the priority scheme, refer to Section 4.2.3.



19. Click on the "Importance" tab. Enter the environmental, safety and/or health consequences which the assessment standard is intended to prevent, avoid, or minimize. For example, inadequate visitor control can put students and staff at risk from unauthorized intruders. Users could enter information discussing the importance of campus security and visitor control and potential concerns associated with inadequate visitor control.

20. Click on the “Background” tab. Briefly summarize the area/topic and subtopic, provide information on state and local laws and regulations applicable to the area/topic and subtopic, and describe state and district level programs that apply to the area/topic and subtopic.

21. Click on the “Links to Detailed Guidance” tab. Enter Internet links and/or documents that provide specific program guidance applicable to the area/topic, subtopic, and assessment standard. To enter or change a hyperlink, select the appropriate link field using the Tab key, then type: (1) the text that should be displayed; (2) the # symbol; and (3) the full web site uniform resource locator (URL). For example, “US Environmental Protection agency#http://www.epa.gov”. Examples of Internet links include the school district’s policy website, a state’s environmental health department website, and the regional EPA office website. NOTE: File paths to documents stored on common drives can also be entered. Examples include documents describing district policies, informational handouts/presentations, and memos.

22. Click on the “Save and Return to Customize Assessment Guidebook” button. Repeat steps 1-21 to enter additional state and district level areas/topics, subtopics, and assessment standards.

23. After all of the state and district level areas/topics and subtopics have been entered and selected for inclusion in the facility guidebook and checklist, click on the “Save and Return to Customize for District” button.

4.2.2 Add/Edit Custom Checklists

The Master Checklist contains all areas/topics, subtopics, and assessment standards that are included in the district’s assessment guidebook, presented in a format designed for assessors to use during site visits. While this checklist is comprehensive, it may be too extensive for practical use during a single facility assessment. Hence, a new feature added in Version 2 is the ability to create custom checklists.

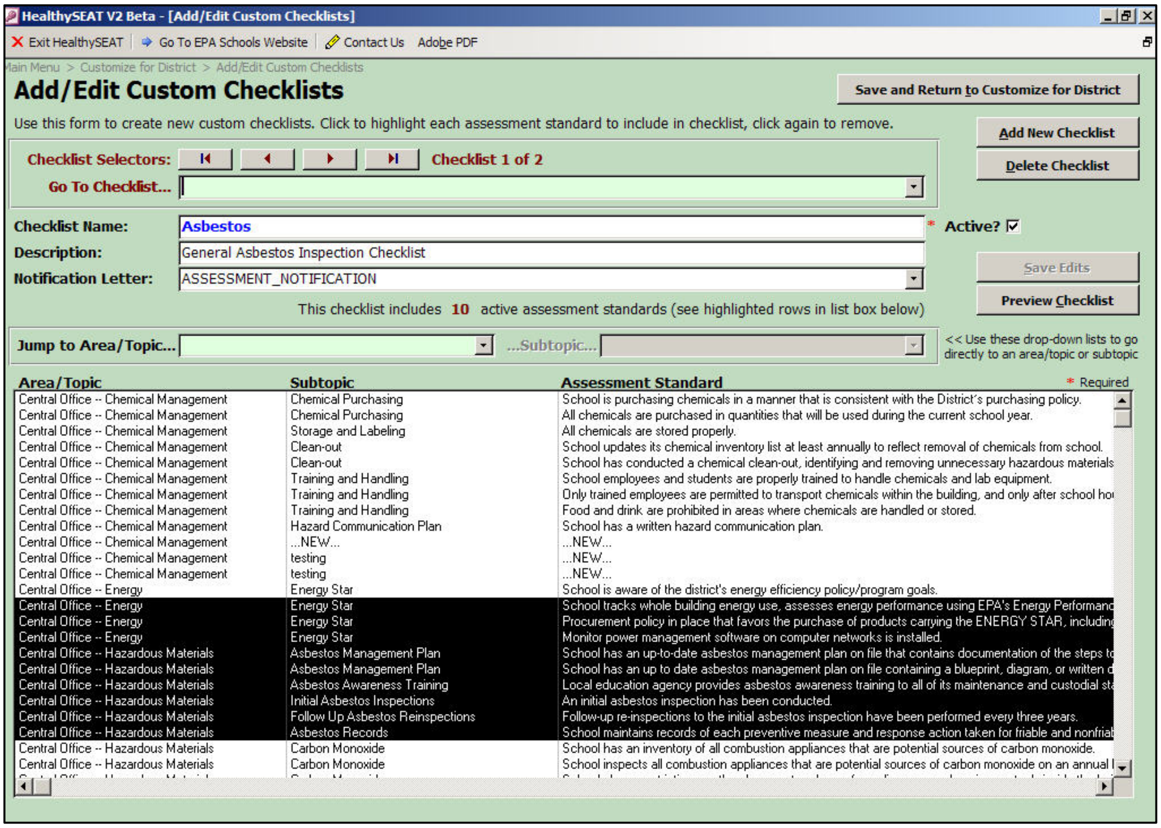
Custom checklists are subsets of the Master Checklist that can be tailored for specific types of assessments. For example, the district may create a custom checklist for asbestos assessments, including on this checklist only assessment standards that relate to asbestos. When assessments are being planned, the user may designate the checklist to be used for the assessment, either the Master Checklist or a specific custom checklist.

Also new in Version 2 is the ability to create new assessment notification letters, which may be associated with a specific custom checklist (see Section 4.2.4). This new feature enables the district to send out notification letters that identify the specific type of assessment to be conducted.

Following is the process for creating a custom checklist:

1. From the Main Menu, click on the “Customize for District” button.

2. Click on the "Add/Edit Custom Checklists" button under Program Information.



3. Click the "Add New Checklist" button, then enter a unique name for the checklist (there cannot be two checklists with the same name). A description of the checklist may also be entered, although this is not required.

4. Select a notification letter to be used in conjunction with this checklist. By default, the standard "ASSESSMENT_NOTIFICATION" letter is selected, but another custom assessment notification letter may be selected, if any have been created (see Section 4.2.4).

5. Listed in tabular format at the bottom of the screen are all areas/topics, subtopics, and assessment standards that are included in the district's assessment guidebook and Master Checklist. To select assessment standards for inclusion in the custom checklist, simply click on the row in the table. Included assessment standards will be highlighted with a black background. To unselect an included assessment standard, simply click it once and the highlighting will disappear.

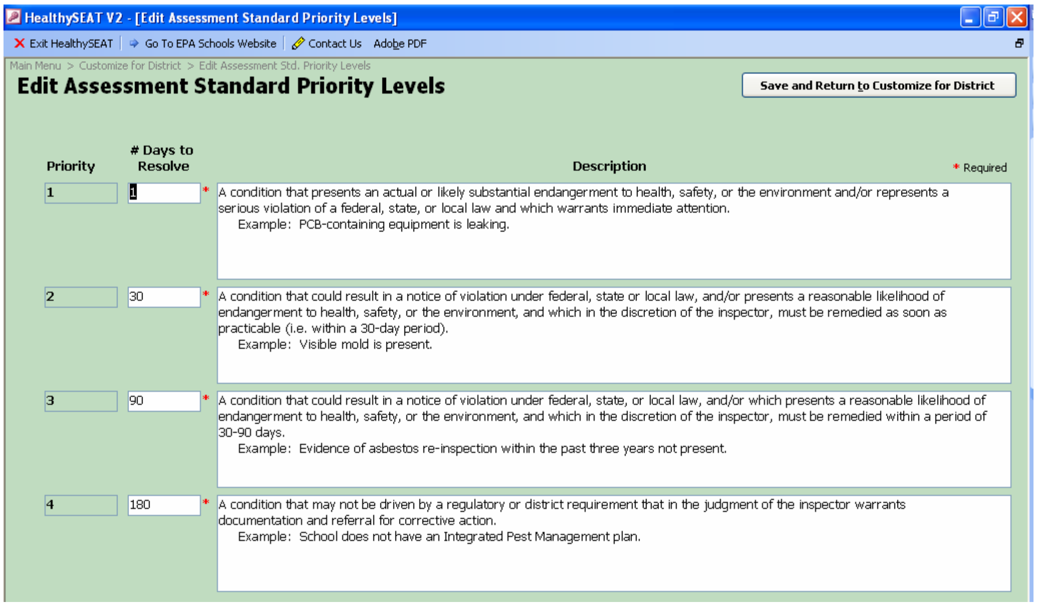
6. After adding the assessment standards, or periodically during the editing process, click the "Save Edits" button to save any changes.

7. Click the "Preview Checklist" button to see the custom checklist formatted for use in the field.

8. When the custom checklist is complete, click the "Save and Return to Customize for District" button.

4.2.3 Edit Assessment Standard Priority Levels

Each assessment standard is assigned a default priority level of 1 through 4. The priority level is an indication of the urgency in implementing recommendations to meet assessment standards. When a recommendation is created, the priority level of the selected assessment standard is automatically assigned to the recommendation, and a due date calculated, though the assessor can adjust these.



By default, the number of days permitted for resolving problems at each priority level are as follows:

Priority Level	# Days to Resolve
1	1
2	30
3	90
4	180

The district can adjust the number of days allowed to resolve each priority level using the following procedure:

1. From the Main Menu, click on the "Customize for District" button.

2. Click on the "Edit Assessment Std. Priority Levels" button under Program Information.

3. To revise the timelines associated with each priority level, click in each of the "# of Days to Resolve" fields and enter new numbers. (NOTE: The HealthySEAT database recognizes all days of the week, as opposed to only working days. Therefore, one week represents 7 days, two weeks represents 14 days, and so forth.) Upon completing these edits, the changes will be reflected throughout HealthySEAT. The changes will apply to new recommendations, but will not apply retroactively to existing recommendations.

4. To revise the guidance language associated with each of the four priority levels, click in each of the "Description" fields and enter new text. Upon completing these edits, the changes will be reflected throughout HealthySEAT whenever priority guidance appears.

5. Click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

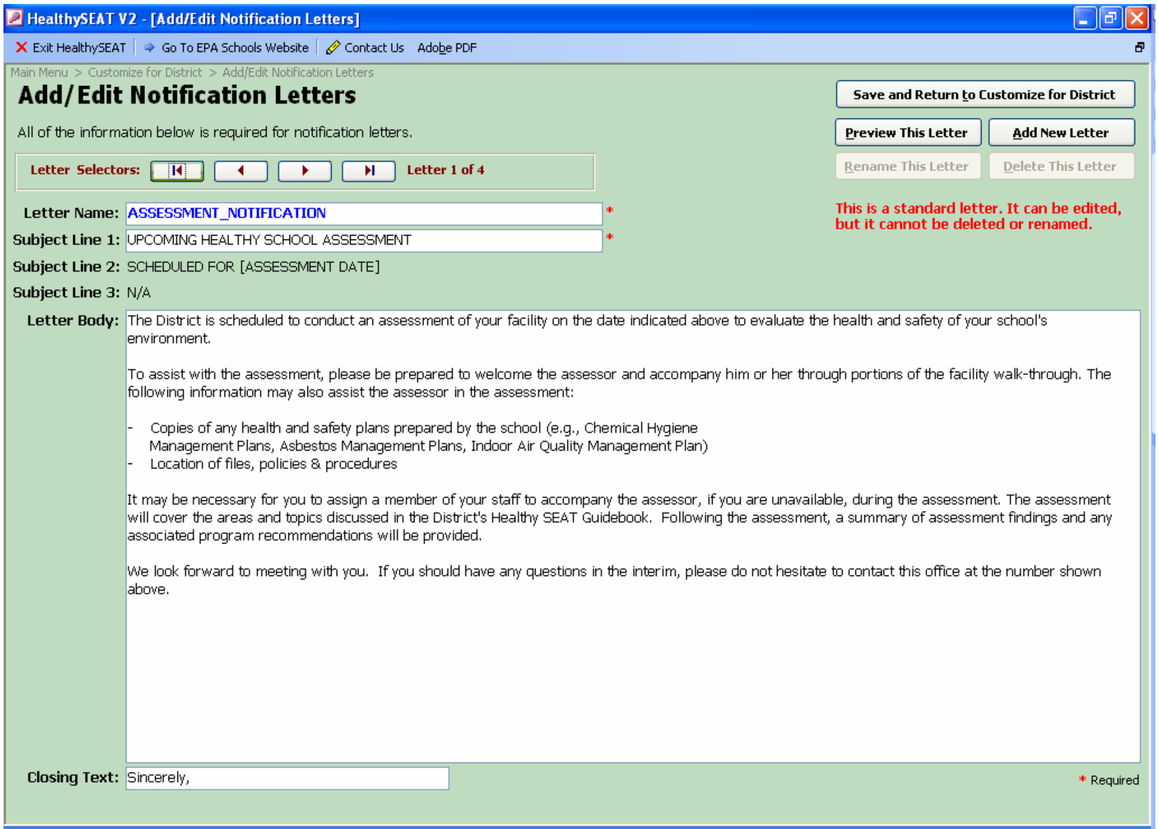
4.2.4 Add/Edit Notification Letters

HealthySEAT comes pre-configured with three notification letters – the Facility Assessment Notification Letter, the Facility Re-Assessment Notification Letter, and the Recommendations Cover Letter, which are named "ASSESSMENT_NOTIFICATION", "RE-ASSESSMENT_NOTIFICAITON", and "RECOMMENDATIONS_COVER", respectively (each of these letters is discussed further in Section 5 of this User's Manual). The "ASSESSMENT_NOTIFICATION" letter is intended to be sent to the facility prior to the initial assessment. The RE-ASSESSMENT_NOTIFICATION" letter is intended to be sent to the facility prior to a re-assessment (if necessary). The "RECOMMENDATIONS_COVER" letter is intended to be sent to the facility following the initial assessment, as an accompaniment to a report of recommendations (See Section 5.4). These standard letters can be edited by the district to suit its needs.

To edit standard notification letters, follow these steps:

1. From the Main Menu, click on the "Customize for District" button.

2. Click on the "Add/Edit Notification Letters" button.



3. Use the letter selector arrows to select one of the standard letters, which are always the first three.

4. Default text will appear for the Letter Name, Subject Line 1, Subject Line 2, Subject Line 3, Letter Body, and Closing Text. Of these fields, the Subject Line 1, Letter Body, and Closing Text may be edited for each standard letter.

5. To preview a generic letter reflecting the edits made, click on the "Preview Letter" button. Select "Close" return to the "Add/Edit Notification Letters" screen.

6. Repeat steps 3-5 for each standard notification letter.

7. When satisfied with the edits made, click on the "Save and Return to Customize for District" button.

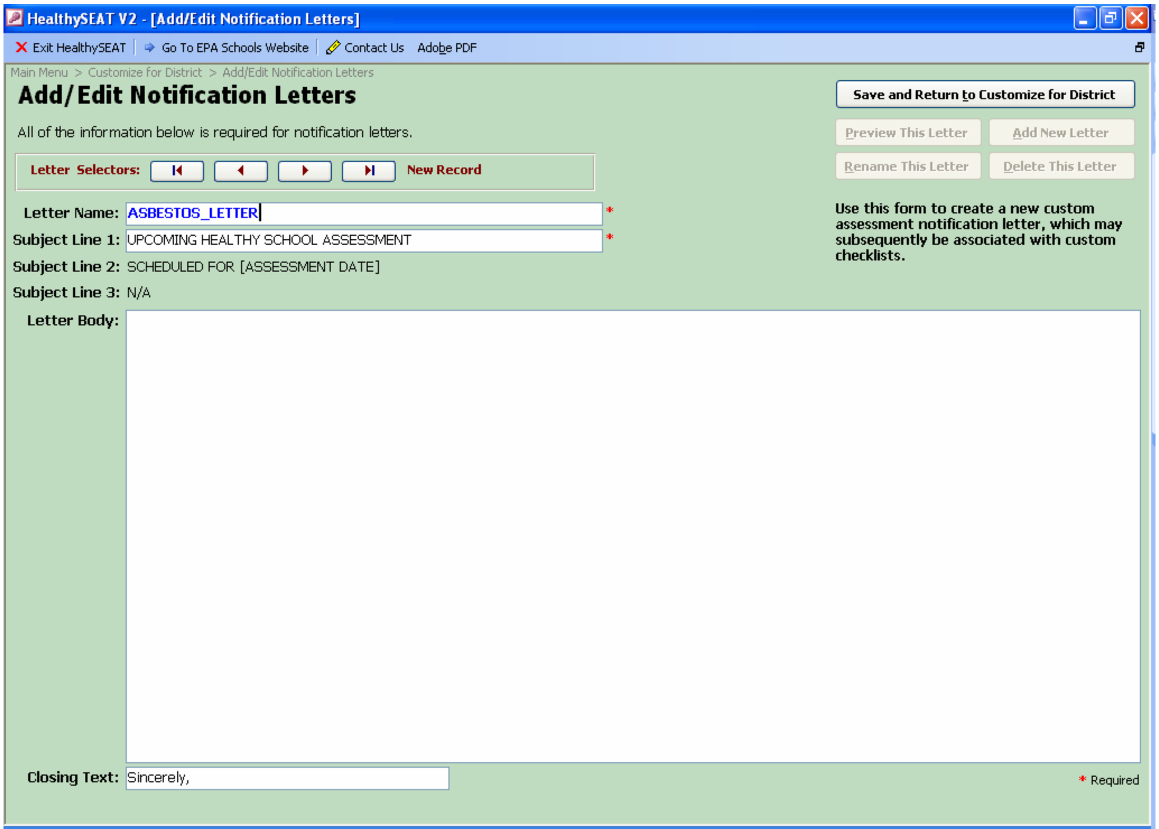
New in Version 2 is the ability to add custom assessment notification letters, which can be assigned to custom checklists in support of special-purpose assessments. These letters are alternatives to the standard "ASSESSMENT_NOTIFICATION" letter, and are only used prior to an initial assessment.

To add a new notification letter, complete the following steps:

1. From the Main Menu, click on the “Customize for District” button.

2. Click on the “Add/Edit Notification Letters” button.

3. From the “Add/Edit Notification Letters” screen, click on the “Add New Letter” button.



4. Enter a unique Letter Name, Subject Line 1, Letter Body, and Closing Text.

5. Use either the previous letter selector or the “Save and Return to Customize for District” button to save the changes to the letter.

6. Return to the letter to preview it using the “Preview This Letter” button, rename it using the “Rename This Letter” button, or delete it using the “Delete This Letter” button. Note that standard letters may not be deleted or renamed but custom letters added by the district may be deleted provided there are no custom checklists configured to use the custom notification letter.

4.2.5 Manage District Policies/Programs

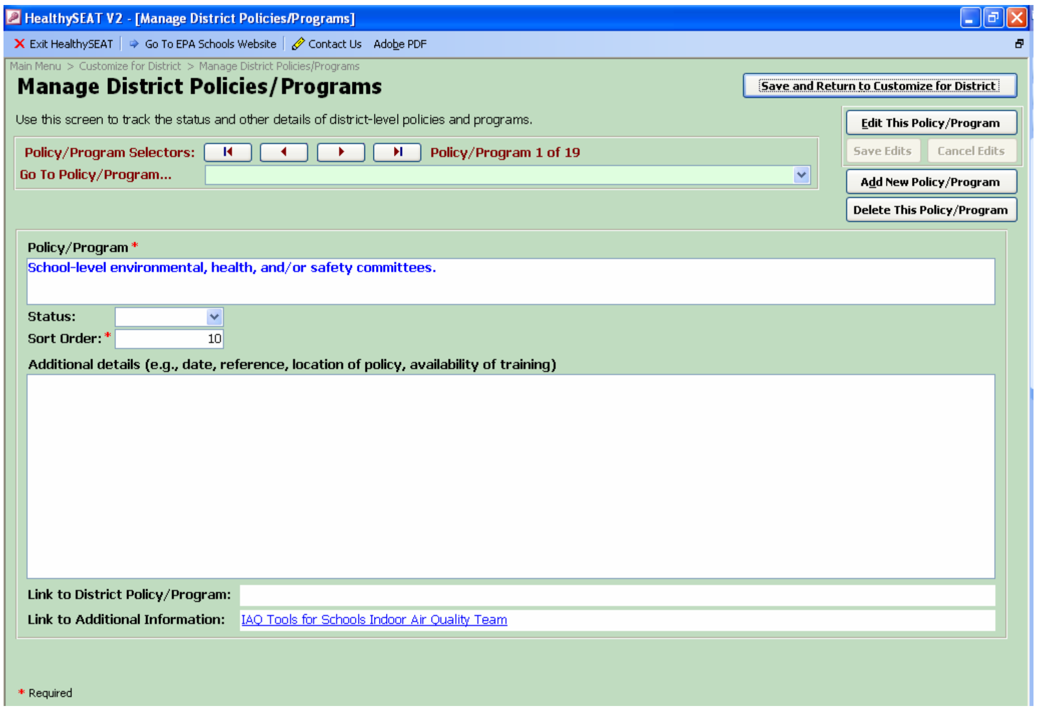
This optional function assists districts in developing and tracking their inventory of district-level environmental policies and programs currently in place or in development. District-level policies are managed and tracked at a district-wide, as opposed to school-by-school level. HealthySEAT currently includes 19 areas in which districts may already have, or want to develop policies and/or programs.

In addition to the 19 policies/programs currently included, the district can add new policies/programs to the tool. The text fields allow the user to track the status of policies/programs as well as obtain additional information.

1. From the Main Menu, click on the "Customize for District" button.

2. Click on the "Manage District Policies/Programs" button.

3. Use the "Policy/Program Selectors" at the top of the screen to scroll through each policy/program, or use the "Got To Policy/Program…" drop-down list to go directly to a specific policy/program.



4. If desired, edit the existing text by clicking on the "Edit Policy" button.

5. If desired, enter a number in the sort order field to adjust each policy's order of appearance.

6. Click on the down arrow button in the status field to display the pull-down menu. Select "in place," "in development," or "none," as appropriate for the relative status of each policy or procedure.

7. In the "Additional details" text box, enter details on the policy/program such as the effective date, policy reference, location of policy documents, availability of training, etc.

8. In the Link to District Policy/Program field, enter the description of the link, followed by the # sign, followed by the complete URL or universal naming convention (UNC) path (e.g. EPA Healthy Schools#http://www.epa.gov/schools/).

9. Click on the "Policy Selector" arrows to view the next policy/program. The edited information will be automatically saved.

10. To add a new policy/program, click the "Add Policy" button. Repeat steps 4 through 8.

11. Click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

In addition to being able to add new district-level policies and programs, the district can also delete policies and programs included in HealthySEAT. To delete district-level policies and/or programs, complete the following:

1. Use the "Policy Selector" arrows at the bottom of the screen to scroll through each policy/program to select the desired policy or program.

2. To delete the policy or program, click on the "Delete" button. The following message will appear: "Are you sure you want to remove this policy from the District Policy Group?" Click "Yes" to delete the policy or program.

3. Click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

4.3 Application Settings

The following features of HealthySEAT allow districts to customize the application settings associated with the electronic functions of the tool. Some of these features are intended for advanced users with information technology experience. Please refer to Section 7 of this User's Manual for additional advanced user information.

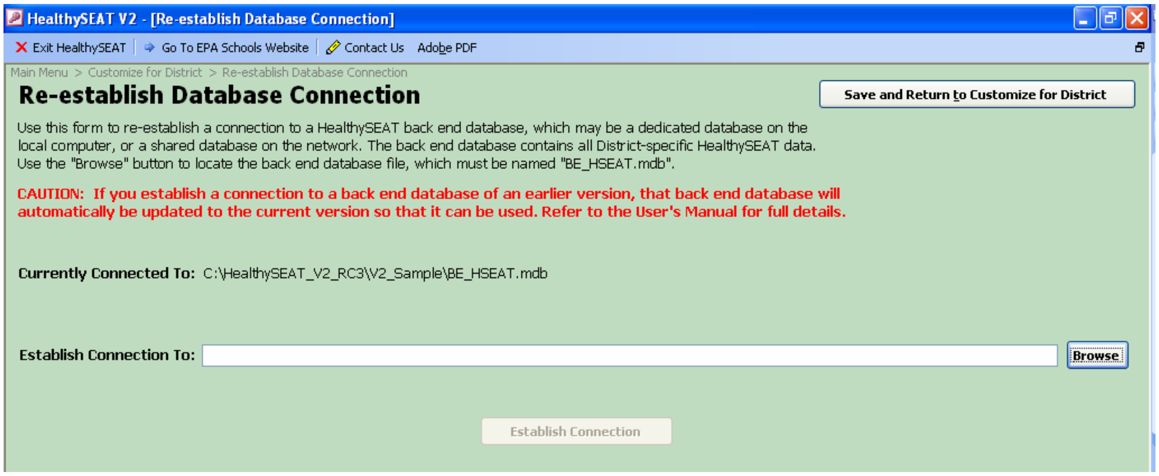
4.3.1 Re-establish Database Connection

In case the front end database (See Section 7.1.1) of HealthySEAT becomes separated from the back end database (See Section 7.1.2) the connection can be re-established through this function.

To re-establish the database connection, complete the following steps:

1. From the Main Menu, click on the "Customize for District" button.

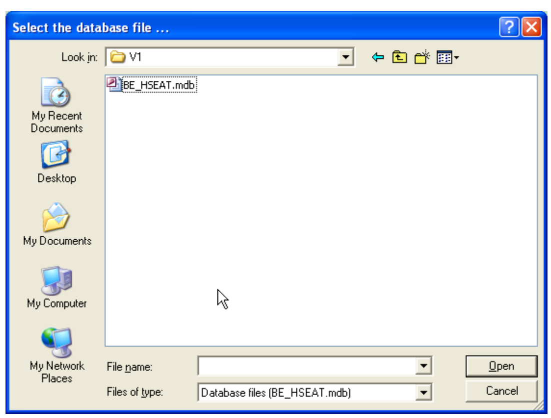
2. Click on the "Re-establish Database Connection" button.



3. The path to the back end database to which HealthySEAT is currently, or was last, connected to is listed next to "Currently Connected To:"

4. To change the database connection, click on the "Browse" button next to the "Establish Connection To:" field.
   Note: The "Browse" for file dialog box allows the end-user to browse only for files named BE_HSEAT.mdb or BE_HSEAT.

5. Select the path to the back end of the database, which is entitled: "BE_HSEAT.mdb" and click "Open."



6. Click on the "Establish Connection" button. HealthySEAT will attempt to establish the connection and will confirm if the connection is successfully established.

7. Click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

4.3.2 Configure Security

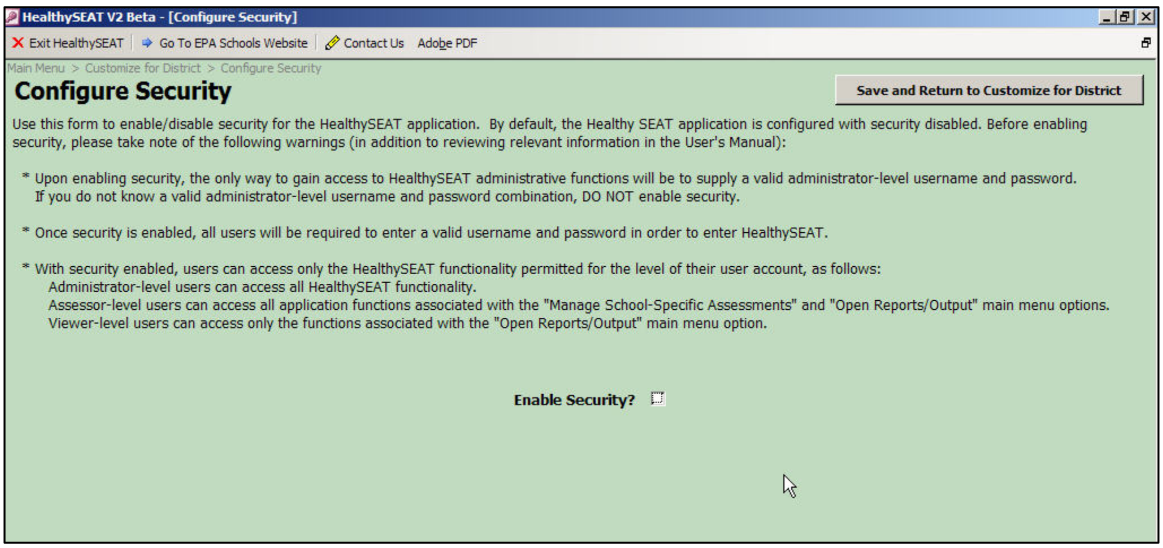
HealthySEAT allows users to select whether they would like security enabled or disabled. The default setting for HealthySEAT Version 2 is security disabled, though it is not recommended to use this in a production, multi-user environment (See Section 3). However, users of HealthySEAT Version 1 who had security enabled will find that security is enabled upon connecting to, and updating, the Version 1 back end database.

To enable security, first ensure that there is at least one user with permission level "Administrator" whose password is known, then complete the following steps:

1. From the Main Menu, click on the "Customize for District" button.

2. Click on the "Configure Security" button.

3. To enable security, click on the check box next to the "Enable Security?" field to toggle on the checkmark.



4. Click on the "Save and Return to Customize for District" button.

5. Click on the "Save and Return to Main Menu" button.

4.3.3 Manage User Accounts

HealthySEAT has three different user levels built into the tool when security is enabled (see Section 4.3.2 above). As discussed in detail in Section 3 of this User's Manual, the three default users include: 1) Admin; 2) Assessor; and 3) Viewer. Each of the three users has varying degrees of access to functions within the tool. The "Administrator" has access to all HealthySEAT functions; the "Assessor" has access to the "Manage School-Specific Assessments" and "Open Reports/Output Menu" functions; and the "Viewer" only has access to the "Open Reports/Output Menu."

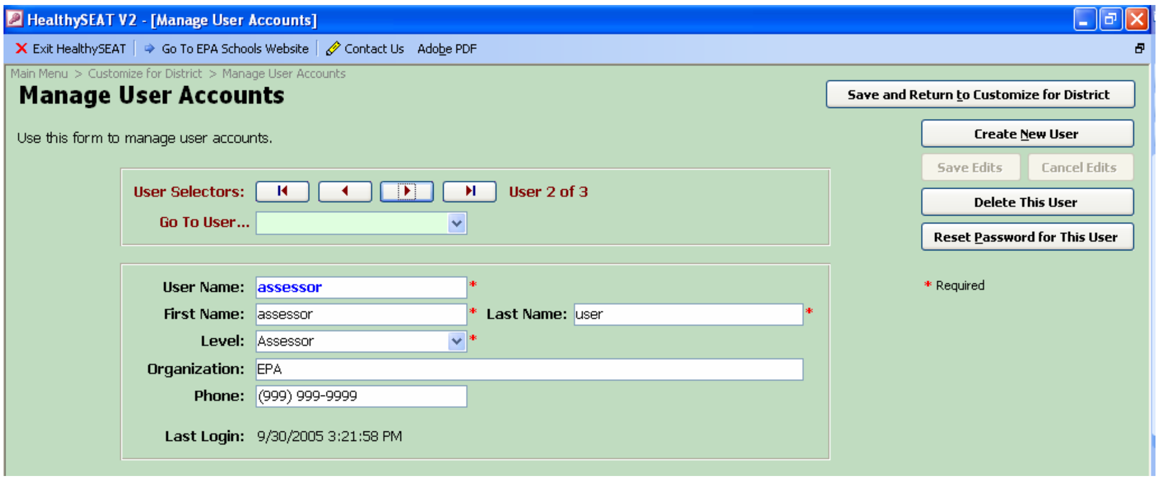
The Manage Users function allows a user with "Administrator" permission level to enter users into the database, assign user access levels, and re-set passwords for each user.

To enter new users, or edit information for existing users into the database, complete the following steps:

1. From the Main Menu, click on the "Customize for District" button.

2. Click on the "Manage User Accounts" button.

3. Enter the "User Name" in the first field. (NOTE: The User Name is the identifier the user will enter during each log-in into the HealthySEAT database.)



4. Enter the user's first name in the "First Name" field.

5. Enter the user's last name in the "Last Name" field.

6. Select the user's security level using the pull-down menu next to the "Level" field. The three security levels, and their corresponding database access levels, include:

   Administrator: The database administrator has access to all screens and functions in the HealthySEAT database. Administrator-level access should be granted to network/IT administrators, individuals responsible for entering and updating facility and district-wide information, and the individual(s) responsible for customizing the content included in the district's assessment program.

   Assessor: Assessors have access to the "Manage School-Specific Assessments" and "Open Reports/Output Menu" functions. Assessor-level access should be granted to all district assessors responsible for preparing, conducting, and reporting on assessments completed at school facilities.

   Viewer: Viewers have access only to the "Open Reports/Output Menu" function. Viewer-level access should be granted to any individuals that the district would like to view the results from assessments at the district-wide level.

NOTE: For all new users entered into the HealthySEAT database, the default password is <changeme>. Upon each user's first login to the database, the user will be prompted to re-enter the default password and create a new personalized password.

7. Enter the user's organizational affiliation or district unit/department in the "Organization" field.

8. Enter the user's phone number in the "Phone" field.

9. For informational purposes only, the "Last Login Date" field allows any individual(s) with administrator-level access to see when the last time each user logged into the database.

10. To enter the next user into the database, click on the "Create New User" button to bring up a blank user data entry screen.

11. Upon entering all users into the database, click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

In the event that existing users lose or forget their personalized passwords, to reset user passwords, complete the following steps:

1. From the Main Menu, click on the "Customize for District" button.

2. From the Customize for District menu, click on the "Manage User Accounts" button.

3. Use either the "Go To User…" drop-down menu or the User Selectors at the top of the screen to select the user needing the password to be reset.

4. To reset the user's password, click on the "Reset Password for This User" button on the right side of the page. The following message will appear: "Password Changed. User: "xxx" has had their password reset to the default password, which is: changeme."

   NOTE: For all new users entered into the HealthySEAT database, the default password is <changeme>. Upon each user's first login to the database, the user will be prompted to re-enter the default password and create a new personalized password.

5. Click "OK" to return to the Manage User Accounts screen.

6. Click on the "Save and Return to Customize for District" button to return to the Customize for District menu.

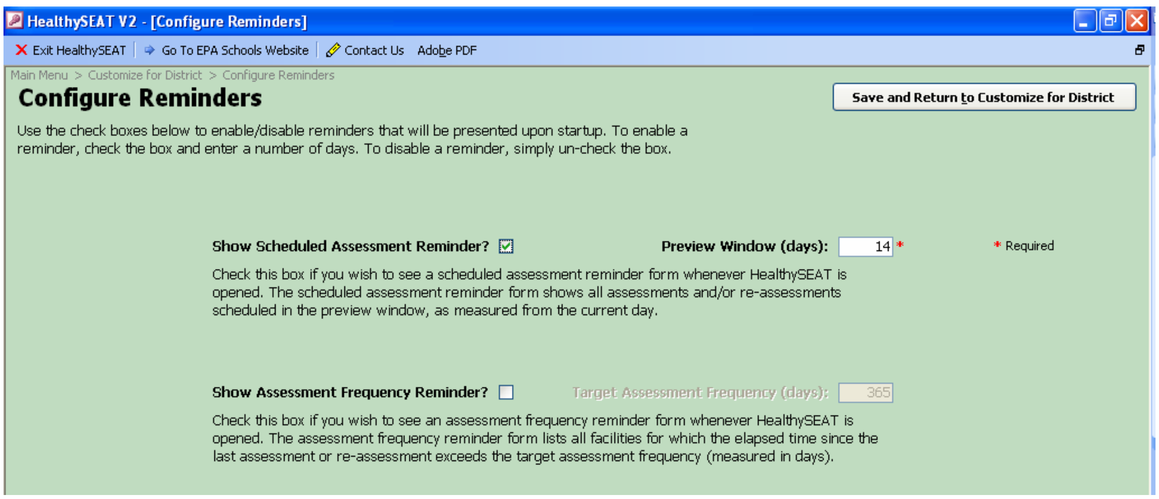
4.3.4 Configure Reminders

HealthySEAT has the ability to provide reminders on start-up. There are two types of reminders - Scheduled Assessment Reminders and Assessment Frequency Reminders. By default, both types of reminders are turned off. The reminder configuration is specific to each user's installation of HealthySEAT – it is not global. If a user would like to receive reminders on start-up, someone with administrative permissions can configure the reminders using the following steps:

1. From the Main Menu, click on the "Customize for District" button.

2. Click on the "Configure Reminders" button.

3. To enable the "Scheduled Assessment Reminder" report, click on the box next to the "Show Scheduled Assessment Reminder?" field to toggle on the checkmark. Adjust the preview windows as desired.



4. To enable the "Assessment Frequency Reminder" report, click on the box next to the "Show Assessment Frequency Reminder?" field to toggle on the checkmark. Adjust the target assessment frequency as desired.

5. Click on the "Save and Return to Customize for District" button.

6. Click on the "Return to Main Menu" button.

7. To verify that the reminders are working properly, exit HealthySEAT and re-launch the tool. At the outset, the reminders requested should appear. If the reports do not open, either repeat steps 1 through 6 above and verify that a checkmark does appear in the toggle box next to each reminder, or check to see if there actually are facilities or assessment records matching the specified criteria.

HealthySEAT is now entirely customized, configured and ready for use.

Section 5
School-Specific Assessment Information

Reminder:

Make frequent copies of your data file (BE_HSEAT.mdb).

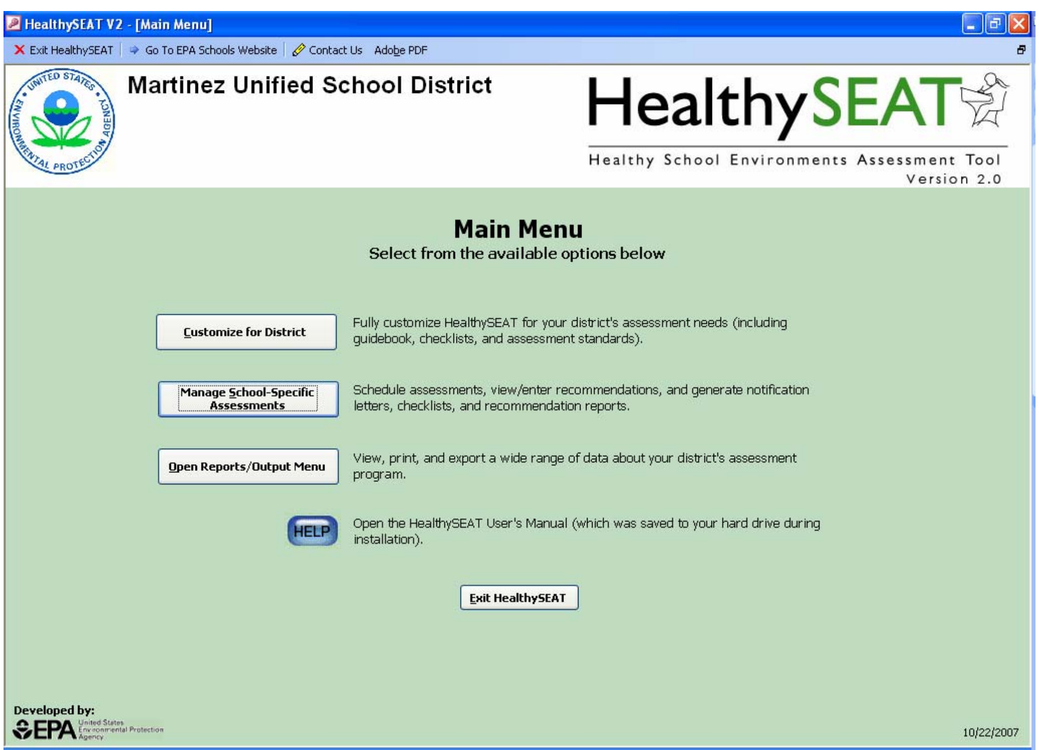
This section discusses each of the steps associated with preparing for, conducting, entering results from, and following-up on recommendations generated from facility assessments. It is assumed in this section that all district-specific configuration discussed in Section 4 has been completed, which includes adding records for each school facility and assessor.

5.1 Preparing for Facility Assessments

The first step in a typical facility assessment workflow is to prepare for the assessment. There are two aspects to preparing for an assessment. One involves preparing the facility for the arrival of an inspector, and the other involves equipping the assessor for the assessment. These aspects are discussed in the following subsections.

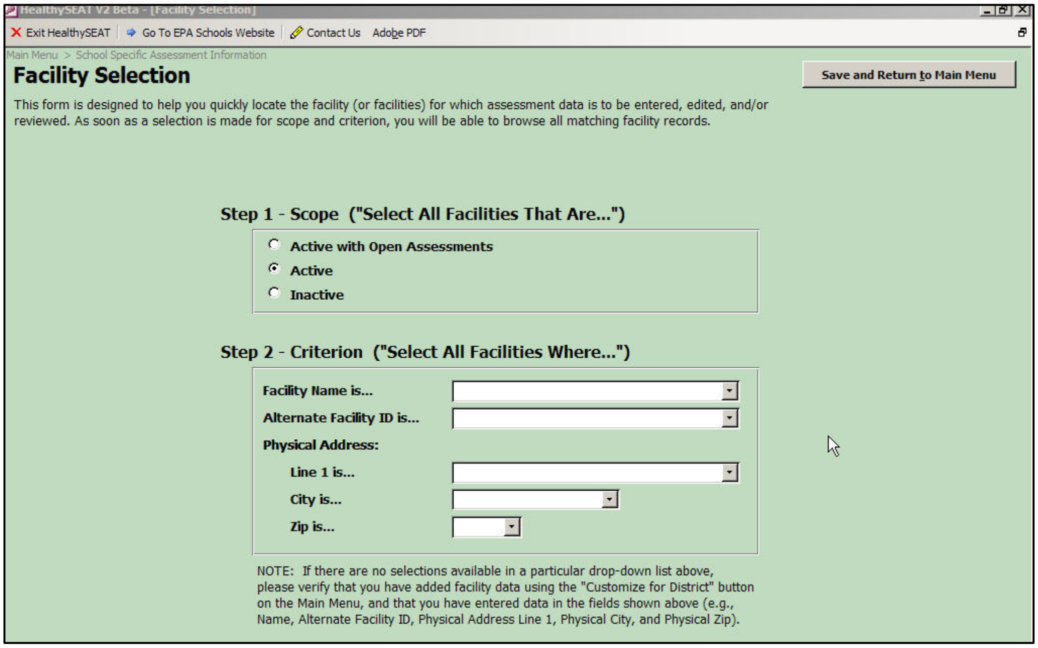
5.1.1 Generate the Assessment Notification Letter

Before a school facility is assessed, the facility management should be notified of the upcoming visit of an assessor, and provided some detail as to what the assessor will be doing, and what will be needed from the facility staff. This can be accomplished with an assessment notification letter, and HealthySEAT is designed to produce a specific letter for this purpose. Use the following steps:

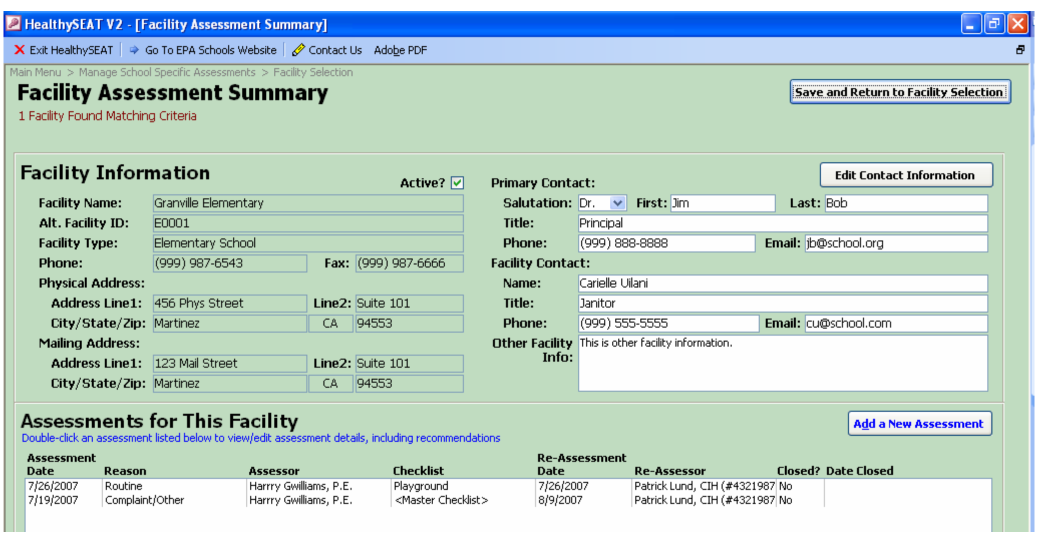


1. From the Main Menu of HealthySEAT, click on the “Manage School-Specific Assessment Information” button.

2. On the Facility Selection screen, in the section labeled “Step 1 – Scope” click the second button to choose from all facilities that are Active.

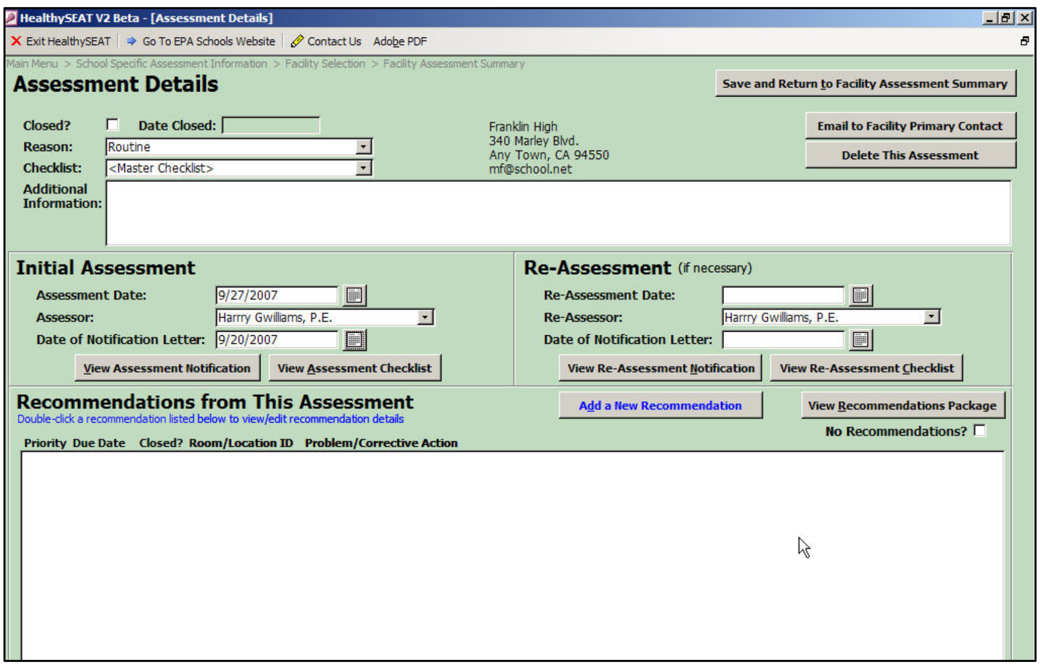


3. Next, in the section labeled “Step 2 – Criterion” select a facility from the alphabetical drop-down menu labeled “Facility Name is…”. This will immediately bring up the Facility Assessment Summary screen, which shows basic information about the selected facility, as well as a list of assessments that have been done or planned for this facility.



4. The basic **facility information** shown in the upper left is for display purposes only. If any of this information is incorrect, someone with administrator level permissions must change it using the "Add/Edit Facilities" option on the "Customize for District" menu (See Section 4.1.3). The facility contact information shown in the upper right, however, is available for editing. If any of this information needs to be updated, click on the "Edit Contact Information" button. This will make all fields with a white background available for editing. Edits are saved automatically by pressing the "Save and Return to Facility Selection" button.

5. In the section at the bottom of the screen labeled "Assessments for This Facility," click the "Add a New Assessment" button. This will result in a new assessment record being created for this facility, and the "Assessment Details" screen will automatically open. To edit an existing assessment, simply double-click on the assessment record to open the Assessment Details screen for that assessment.



6. First, select a reason for the assessment using the drop-down list in the upper left. The five reasons to choose from include: 1) Routine; 2) Incident Response; 3) Complaint/Other; 4) Re-Assessment; and 5) Construction/Renovation.

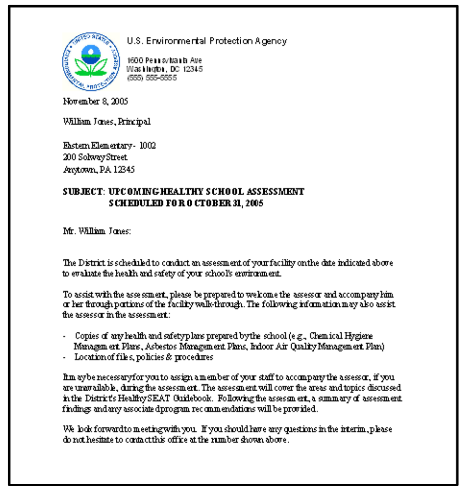
7. Next, select the checklist that will drive this assessment. Select either the Master Checklist, which is the default, or one of the other custom checklists (if any) in the drop-down list. The notification letter generated is determined by the selection of checklist. If the Master Checklist is selected, the default "ASSESSMENT_NOTIFICATION" letter will be generated. If a custom checklist is selected, the assessment notification letter that is configured for that custom checklist will be generated.

8. Next, select an assessment date by clicking on the calendar button to the right of the “Assessment Date” field. This is the date on which the assessment is to take place. Once a date is selected from the calendar pop-up, click “OK.”

9. Next, select an “Assessor” from the pull-down menu. This is the assessor who will conduct the assessment on the assessment date.

10. Then, select the date on which the assessment notification letter will be sent by clicking on the calendar button to the right of the “Date of Notification Letter” field. Once a date is selected from the calendar pop-up, click “OK.”

11. To generate a letter to send to the facility primary contact, click on the “View Assessment Notification” button. The letter will be presented in preview mode. Verify that the information on the letter is correct. If the text of the letter is not correct or requires further customization, refer to Section 4.2.3 of this User’s Manual to update the notification letter text. Once the letter is satisfactory, print the letter using the Print button on the button bar.



U.S. Environmental Protection Agency

1600 Pennsylvania Ave
Washington, DC 12345
(555) 555-5555

November 8, 2005

William Jones, Principal

Eastern Elementary - 1002
200 Solway Street
Anytown, PA 12345

SUBJECT: UPCOMING HEALTHY SCHOOL ASSESSMENT SCHEDULED FOR OCTOBER 31, 2005

Mr. William Jones:

The District is scheduled to conduct an assessment of your facility on the date indicated above to evaluate the health and safety of your school's environment.

To assist with the assessment, please be prepared to welcome the assessor and accompany him or her through portions of the facility walk-through. The following information may also assist the assessor in the assessment:

- Copies of any health and safety plans prepared by the school (e.g., Chemical Hygiene Management Plans, Asbestos Management Plans, Indoor Air Quality Management Plan)
- Location of files, policies & procedures

It may be necessary for you to assign a member of your staff to accompany the assessor, if you are unavailable, during the assessment. The assessment will cover the areas and topics discussed in the District's HealthySEAT Guidebook. Following the assessment, a summary of assessment findings and any associated program recommendations will be provided.

We look forward to meeting with you. If you should have any questions in the interim, please do not hesitate to contact this office at the number shown above.

To generate a hard copy of the letter, which can be mailed, select a printer and press “OK.” NOTE: If a full version of Adobe Acrobat is installed on the computer, the letter may alternatively be saved as a PDF (portable document format) file by selecting “Adobe PDF” as the printer.

12. When printing is complete, click the “Close” button in the button bar to return to the “Assessment Details” screen.

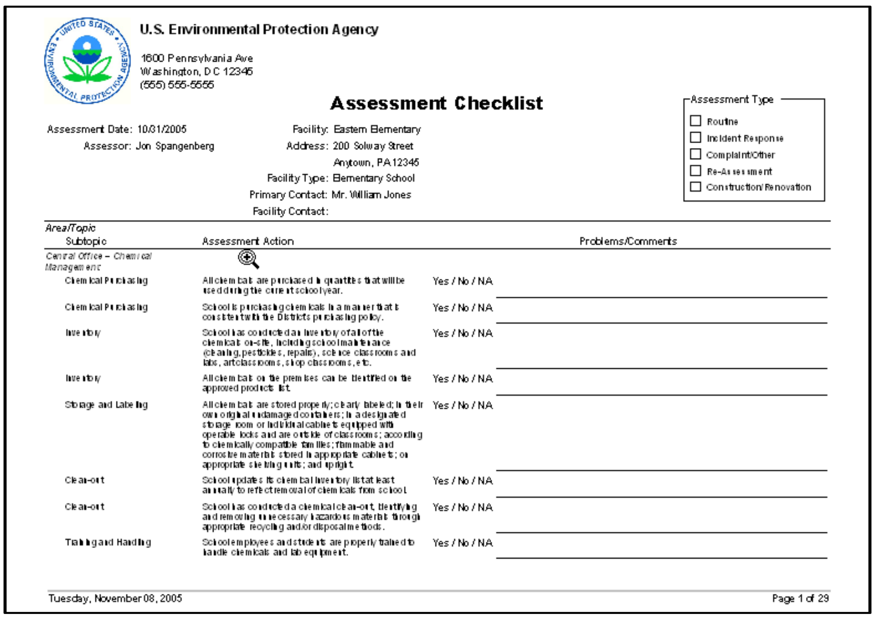
13. If there is an Email address for the facility primary contact, and the user’s computer is configured to send Email, clicking the “Email to Facility Primary Contact” button will open an Email message to the facility primary contact. The notification letter and the assessment checklist can then be added as attachments and sent via Email.

5.1.2 Generate the Assessment Checklist

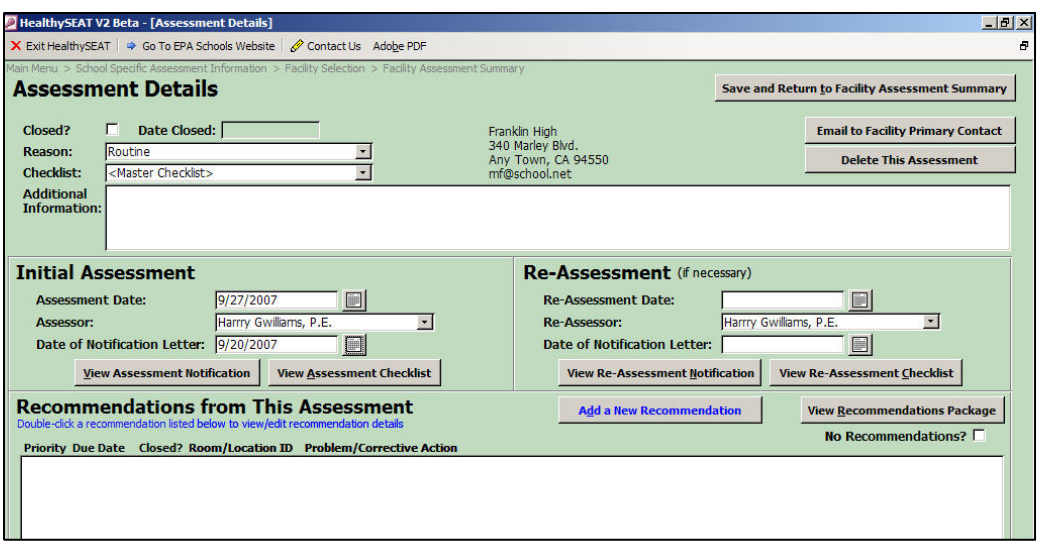
The initial assessment has now been successfully planned, and the assessment notification letter generated. The next step is to prepare the assessor for the initial assessment, which can either be done at the same time the letter is generated (preferable), or any time before the assessment. For the sake of this example, we will assume that the assessment checklist is generated immediately following the generation of the assessment notification letter. Hence, the user remains on the “Assessment Details” screen.

1. To generate a checklist for the assessor, and to send to the facility primary contact along with the assessment notification letter, click on the "View Assessment Checklist" button. The checklist will be presented in preview mode. If the checklist looks correct, print it using the Print button on the button bar.

   To generate a hard copy of the checklist, which can be mailed, select a printer and press "OK." NOTE: If a full version of Adobe Acrobat is installed on the computer, the checklist may alternatively be saved as a PDF (portable document format) file by selecting "Adobe PDF" as the printer.



2. When printing is complete, click the "Close" button in the button bar to return to the "Assessment Details" screen.



3. If there is an Email address for the facility primary contact, and the user's computer is configured to send Email, clicking the "Email to Facility Primary Contact" button will open an Email message to the facility primary contact. The notification letter and assessment checklist can then be added as attachments and sent via Email.

4. Click on the "Save and Return to Facility Assessment Summary" button.

5. Click on the "Save and Return to Facility Selection" button.

6. Click on the "Save and Return to Main Menu" button.

Ideally, copies of the notification letter and checklist should be compiled into one package sent to the primary contact of the facility scheduled for the assessment, and copied to the facility contact, at least two weeks prior to the scheduled assessment date. This will notify those responsible for the school facility of the upcoming assessment, allow the school to prepare necessary materials for the assessor(s), and allow the school to become familiar with the assessment process.

5.2 Conducting Facility Assessments

The assessment checklist serves as a guide for conducting facility assessments. The assessment standards, organized under subtopics and areas/topics, direct the facility assessor as to what conditions to look for. Each assessment standard is written such that the affirmative, or "yes" answer, is the desired response. The yes/no/not applicable (NA) column on the assessment checklist allows the assessor to note whether the assessment standard is being met or not, or whether it is not applicable. The "Problem Description/Corrective Action" column allows the facility assessor to identify the specific problem and/or corrective action required when an assessment standard is not being met. The Room/Location column allows the assessor to identify the specific places within the school facility where problems exist.

5.2.1 Prior to the Facility Assessment

Prior to conducting the facility assessment, it is recommended that the facility assessor:

1. Determine the **reason** for the assessment (Routine, Incident Response, Complaint/Other, Re-Assessment, or Construction/Renovation).

   - A *Routine* facility assessment is conducted as the district mandates, usually at least once per year. The purpose of a routine facility assessment is to identify potential environmental hazards within the facility.

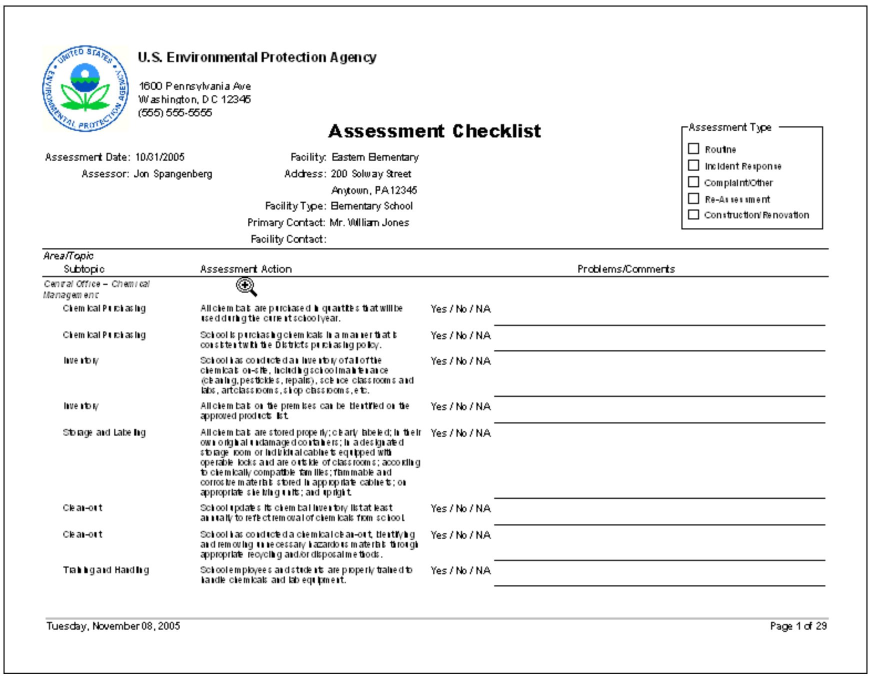
   - An *Incident Response* assessment is typically conducted after an incident occurs (e.g. chemical release, damage to asbestos containing materials, discovery of high levels of radon, etc.).

- A *Complaint* assessment is typically initiated in response to a complaint being filed by or a request from students, staff, or parents to investigate a potential problem (e.g. mold growth, unusual odors, smoking complaints, etc.).

- A *Re-Assessment* is a follow up to a previous facility assessment where recommendations or findings determined that further actions were necessary.

- A *Construction/Renovation* assessment is typically conducted prior to and during construction and/or renovation of a facility.

2. Become familiar with the assessment **checklist**.



U.S. Environmental Protection Agency

1600 Pennsylvania Ave
Washington, DC 12345
(555) 555-5555

Assessment Checklist

Assessment Type
- ☐ Routine
- ☐ Incident Response
- ☐ Complaint/Other
- ☐ Re-Assessment
- ☐ Construction/Renovation

Assessment Date: 10/31/2005
Assessor: Jon Spangenberg

Facility: Eastern Elementary
Address: 200 Solway Street
Anytown, PA 12345
Facility Type: Elementary School
Primary Contact: Mr. William Jones
Facility Contact:

Area/Topic Subtopic	Assessment Action		Problems/Comments
Central Office – Chemical Management			
Chemical Purchasing	All chemicals are purchased in quantities that will be used during the current school year.	Yes / No / NA	
Chemical Purchasing	School is purchasing chemicals in a manner that is consistent with the Districts purchasing policy.	Yes / No / NA	
Inventory	School has conducted an inventory of all of the chemicals on-site, including school maintenance (cleaning, pesticides, repairs), science classrooms and labs, art classrooms, shop classrooms, etc.	Yes / No / NA	
Inventory	All chemicals on the premises can be identified on the approved products list.	Yes / No / NA	
Storage and Labeling	All chemicals are stored properly; clearly labeled; in their own original undamaged containers; in a designated storage room or individual cabinets equipped with operable locks and are outside of classrooms; according to chemically compatible families; flammable and corrosive materials stored in appropriate cabinets; on appropriate shelving units; and upright.	Yes / No / NA	
Clean-out	School updates its chemical inventory list at least annually to reflect removal of chemicals from school.	Yes / No / NA	
Clean-out	School has conducted a chemical clean-out, identifying and removing unnecessary hazardous materials through appropriate recycling and/or disposal methods.	Yes / No / NA	
Training and Handling	School employees and students are properly trained to handle chemicals and lab equipment.	Yes / No / NA	

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3. Contact the primary contact and/or the facility contact and arrange to meet with the appropriate staff, such as the principal, educators, maintenance personnel, cafeteria staff, landscapers, and/or HVAC personnel.

5.2.2 During the Facility Assessment

While conducting the facility assessment, the facility assessor should:

1. Determine whether yes, no or NA (not applicable) applies for each assessment standard listed on the assessment checklist generated specifically for the assessment.

2. Interview school administrators and staff and review documents and files as necessary to complete the assessment checklist, in conformance with the assessment guidance offered in the guidebook.

3. Fill out the Yes/No/NA column for each assessment standard. For example, if the assessment standard reads, "Lights and machines are turned off when not in use," and the facility assessor finds the lights and computers turned on in an empty classroom, he or she would circle "no."

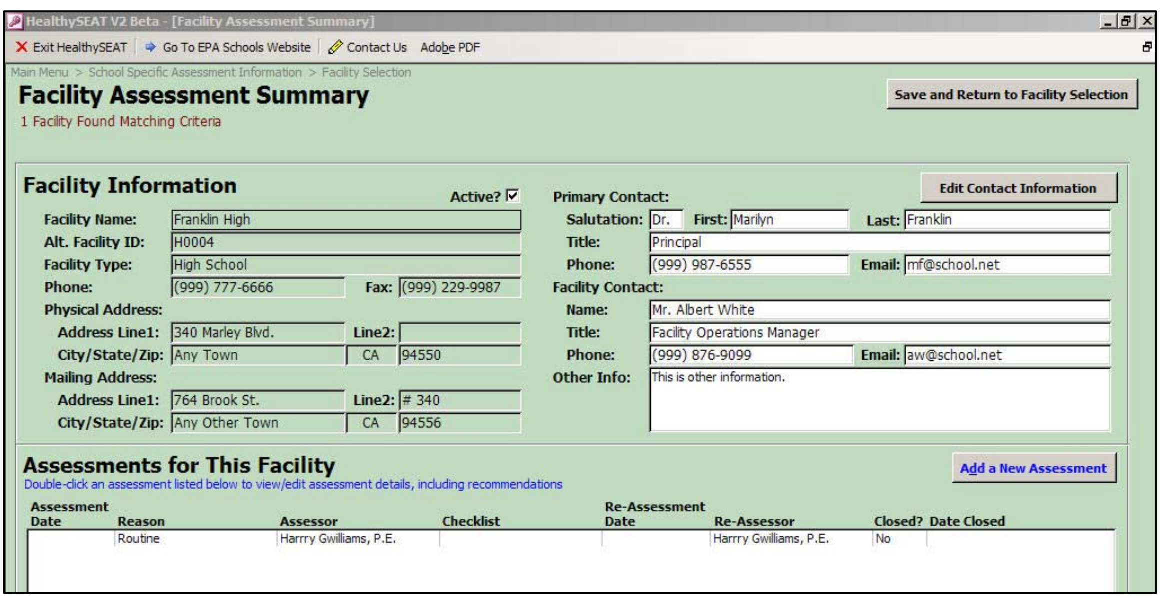
4. For each "no" response, the assessor should provide (1) descriptive information in the "Problem Description/Corrective Action" column, and (2) the Room or Location where problems were found. For example, the assessor might enter "Lights and computers turned on while students are at lunch" for Problem Description/Corrective Action, and "Classroom 110" for Room/Location.

5.3 Entering Recommendations

After the assessment is complete, the results recorded on the checklist are entered into the HealthySEAT database. Issues of concern noted by the assessor on the assessment checklist should be entered into HealthySEAT as recommendations for the facility. To enter results, complete the following:

1. From the Main Menu, click on the "Manage School-Specific Assessments" button.

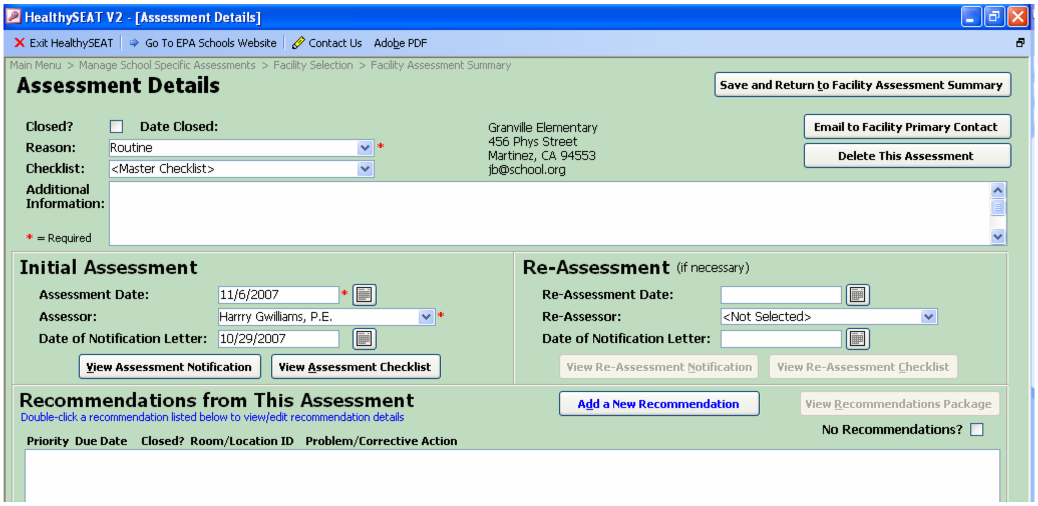
2. On the Facility Selection screen, under Step 1 – Scope, select "Active with Open Assessments". Under Step 2 – Criterion, select the facility for which the assessment was completed.



3. On the "Facility Assessment Summary" screen, use the Edit Contact Information button to update information as needed.

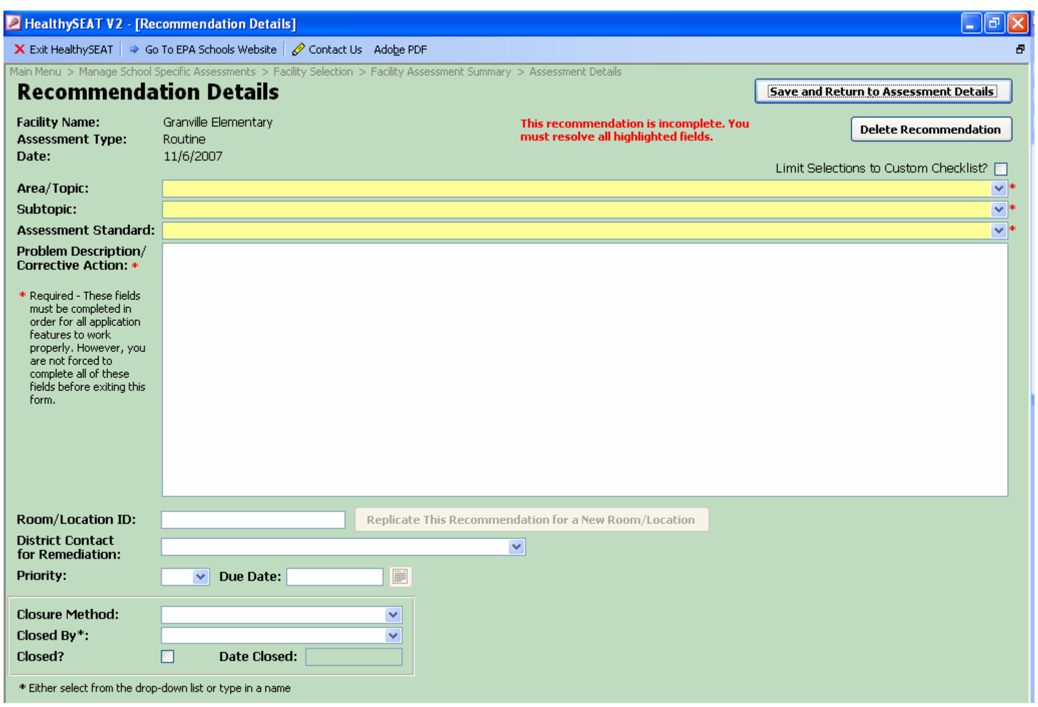
4. Double-click on the most recent assessment listed under "Assessments for This Facility" to open the "Assessment Details" screen. If, for some reason, an

assessment was performed without first creating an assessment record, the assessment will have to be created using the "Add a New Assessment" button and entering all required fields. If any assessment information needs updating, do it right away.



5. Recommendations from the assessment must be added one-by-one, after which they will appear as rows in the "Recommendations from This Assessment" table at the bottom of the screen. If there are no recommendations, check the box next to "No Recommendations?" and check the box next to "Closed?" at the top.

6. To enter a recommendation, click the "Add a New Recommendation" button, which will immediately create a recommendation record and open the Recommendation Details screen.



7. Find an assessment standard on the assessment checklist that received a negative ("No") response. On the Recommendation Details screen, use the drop-down lists at the top to select the **Area/Topic**, **Subtopic**, and **Assessment Standard** to which the recommendation applies.

8. In the **Problem Description/Corrective Action** field, enter any information recorded on the assessment checklist in the "Problem Description/Corrective Action" column. Examples of this could include specific recommendations for corrective action, a work order number issued to remedy the issue(s), or any other comments the assessor feels necessary to document and convey to the facility's primary contact .

9. In the optional **Room/Location ID** field, enter the specific room number or location identifier for the current recommendation. If the same problem was found at multiple locations, use the button named "Replicate This Recommendation for a New Room/Location." The user will be prompted for a new "Room/ Location ID" in a pop-up window.

10. In the optional **District Contact for Remediation** field select, from the drop-down list, the individual determined to be the contact for remediation and thus responsible for implementing the specific recommendation.

11. The **Priority** and **Due Date** fields are automatically assigned based upon the default priority for the selected Assessment Standard, and the global default "# Days to Resolve" associated with that priority level. However, the priority and due date can be overridden for the recommendation at the discretion of the assessor. Priority definitions are set by default, but can be customized, as outlined in Section 4.2.3 of this User's Manual.

12. The recommendation is complete. The remaining fields at the bottom of the "Recommendations Details" page are available for use when closing out an implemented recommendation. Click on the "Save and Return to Assessment Details" button to return to the "Assessment Details" screen.

13. If there are additional recommendations from the facility assessment, repeat steps 6-12 above.

5.4 The Recommendations Package

After entering all recommendations from the assessment checklist, the user can generate the recommendations package to send it to the facility.

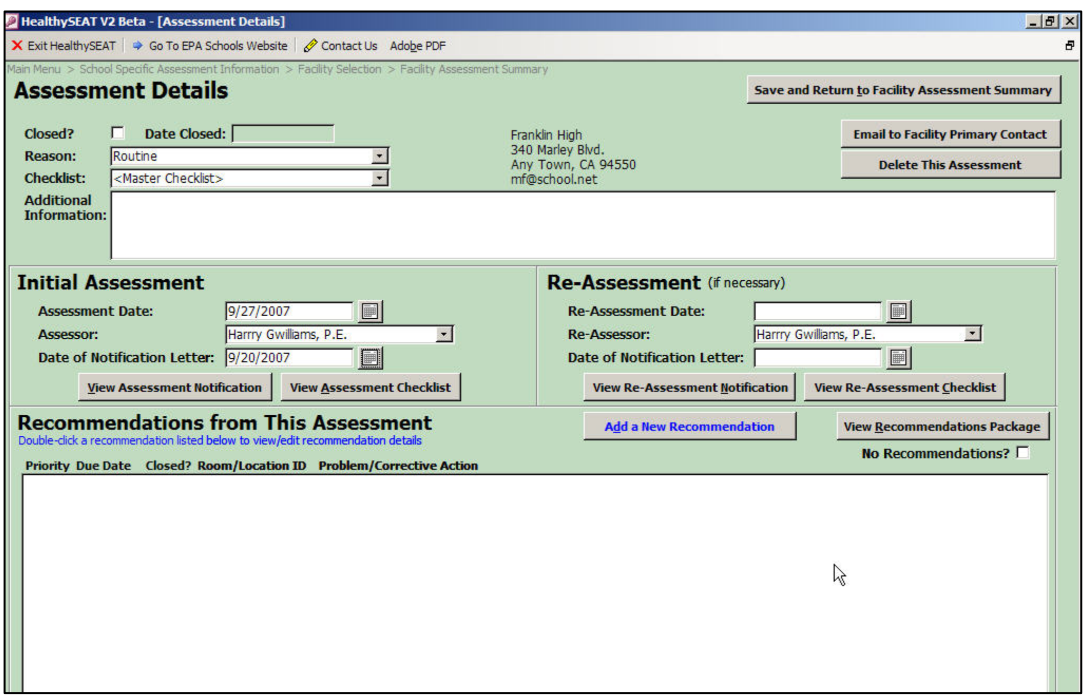
The recommendation package consists of: a) a cover letter; b) a Recommendations Notice; and c) a Self-Certification Form. The cover letter should remind the primary contact and facility contact to implement recommendations immediately. The Recommendations Notice is a detailed account of all the recommendations generated during the facility assessment and includes the assigned priority and due date for each.

The Self-Certification Form is an optional form that allows facility primary contacts to verify and certify the implementation of recommendations. If the district elects to use the Self-Certification Form, once the school has implemented the recommendations identified on the form, the facility's primary contact is advised in the cover letter to return a signed copy of this form to the district assessor. NOTE: The self-certification option and process is provided to allow districts to establish a mechanism for closing recommendations without requiring an on-site re-assessment. Districts may choose whether or not they would like to use the self-certification process to close out recommendations generated from facility assessments.

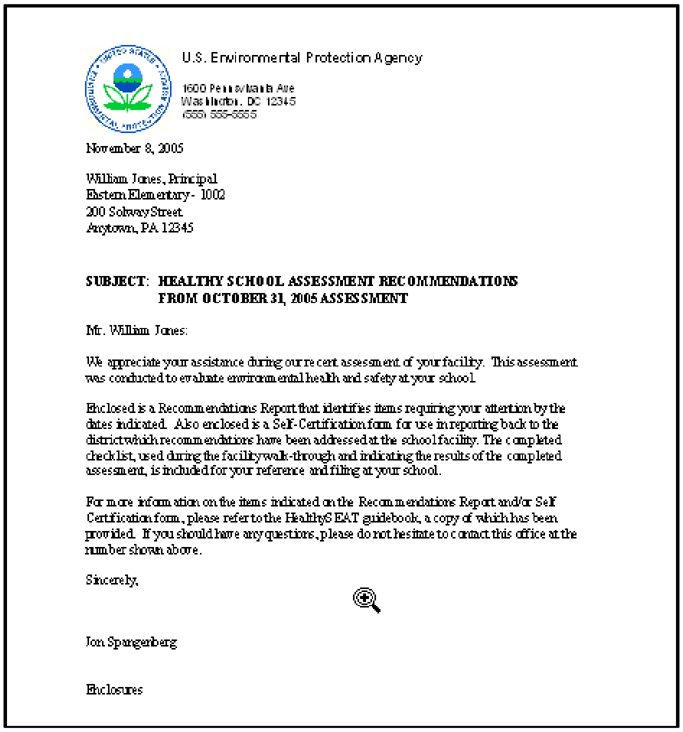
To prepare the Recommendations Package, complete the steps outlined below.

5.4.1 Generating the Recommendations Package

1. From the Assessment Details screen, click on the "View Recommendations Package" button.



2. Three separate documents will be opened in preview mode, with the cover letter on top. Click Print on the button bar, then click Close on the button bar.



U.S. Environmental Protection Agency

1600 Pennsylvania Ave
Washington, DC 12345
(555) 555-5555

November 8, 2005

William Jones, Principal
Eastern Elementary - 1002
200 Solway Street
Anytown, PA 12345

SUBJECT: HEALTHY SCHOOL ASSESSMENT RECOMMENDATIONS FROM OCTOBER 31, 2005 ASSESSMENT

Mr. William Jones:

We appreciate your assistance during our recent assessment of your facility. This assessment was conducted to evaluate environmental health and safety at your school.

Enclosed is a Recommendations Report that identifies items requiring your attention by the dates indicated. Also enclosed is a Self-Certification form for use in reporting back to the district which recommendations have been addressed at the school facility. The completed checklist, used during the facility walk-through and indicating the results of the completed assessment, is included for your reference and filing at your school.

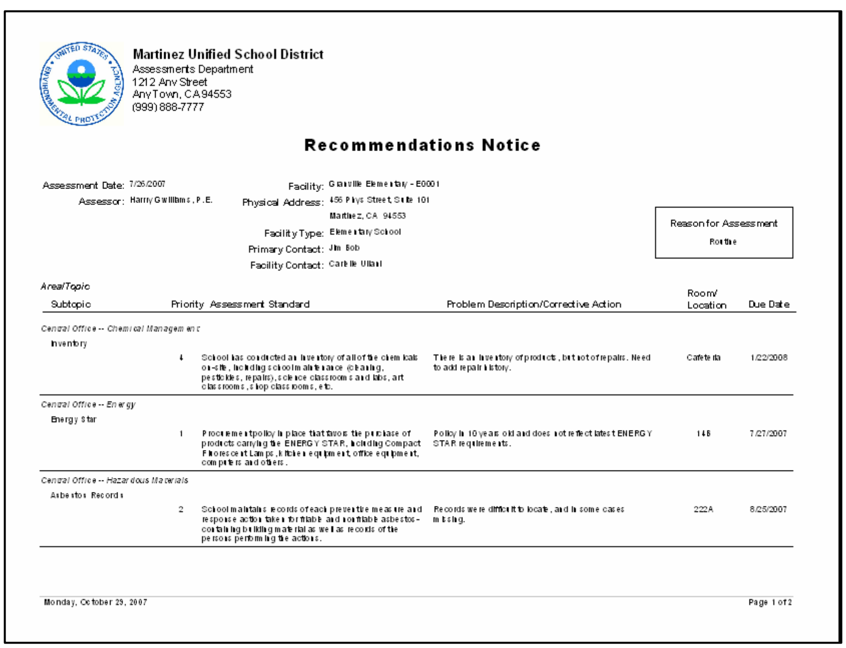
For more information on the items indicated on the Recommendations Report and/or Self Certification form, please refer to the HealthySEAT guidebook, a copy of which has been provided. If you should have any questions, please do not hesitate to contact this office at the number shown above.

Sincerely,

Jon Spangenberg

Enclosures

3. The next document is the Recommendations Notice. Click Print on the button bar, then click Close on the button bar.



Martinez Unified School District
Assessments Department
1212 Anv Street
AnyTown, CA 94553
(999) 888-7777

Recommendations Notice

Assessment Date: 7/26/2007
Assessor: Harry Gwilliams, P.E.

Facility: Granville Elementary - E0001
Physical Address: 456 Phys Street, Suite 101
Martinez, CA 94553
Facility Type: Elementary School
Primary Contact: Jim Bob
Facility Contact: Carlie Ullani

Reason for Assessment
Routine

Area/Topic Subtopic	Priority	Assessment Standard	Problem Description/Corrective Action	Room/ Location	Due Date
Central Office -- Chemical Management					
Inventory					
	4	School has conducted an inventory of all of the chemicals on-site, including school maintenance (cleaning, pesticides, repairs), science classrooms and labs, art classrooms, shop classrooms, etc.	There is an inventory of products, but not of repairs. Need to add repair history.	Cafeteria	1/22/2008
Central Office -- Energy					
Energy Star					
	1	Procurement policy in place that favors the purchase of products carrying the ENERGY STAR, including Compact Fluorescent Lamps, kitchen equipment, office equipment, computers and others.	Policy is 10 years old and does not reflect latest ENERGY STAR requirements.	14B	7/27/2007
Central Office -- Hazardous Materials					
Asbestos Records					
	2	School maintains records of each preventive measure and response action taken for friable and nonfriable asbestos-containing building material as well as records of the persons performing the actions.	Records were difficult to locate, and in some cases missing.	222A	8/25/2007

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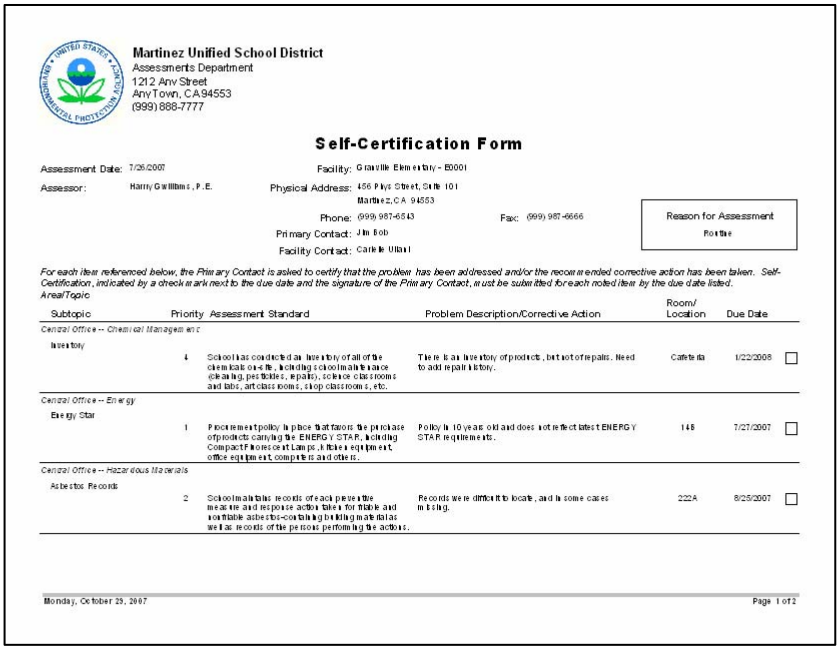
4. The last of the three documents is the Self-Certification Form. Click Print on the button bar, then click Close on the button bar.



Martinez Unified School District
Assessments Department
1212 Any Street
AnyTown, CA 94553
(999) 888-7777

Self-Certification Form

Assessment Date: 7/26/2007
Assessor: Harry Gwilliams, P.E.

Facility: Granville Elementary - E0001
Physical Address: 456 Plys Street, Suite 101
Martinez, CA 94553
Phone: (999) 987-6543 Fax: (999) 987-6666
Primary Contact: Jim Bob
Facility Contact: Carlie Ullari

Reason for Assessment
Routine

For each item referenced below, the Primary Contact is asked to certify that the problem has been addressed and/or the recommended corrective action has been taken. Self-Certification, indicated by a check mark next to the due date and the signature of the Primary Contact, must be submitted for each noted item by the due date listed.

Area/Topic Subtopic	Priority	Assessment Standard	Problem Description/Corrective Action	Room/ Location	Due Date	
Central Office -- Chemical Management						
Inventory	4	School has conducted an inventory of all of the chemicals on-site, including school maintenance (cleaning, pesticides, repairs), science classrooms and labs, art classrooms, shop classrooms, etc.	There is an inventory of products, but not of repairs. Need to add repair history.	Cafeteria	1/22/2008	☐
Central Office -- Energy						
Energy Star	1	Procurement policy in place that favors the purchase of products carrying the ENERGY STAR, including Compact Fluorescent Lamps, kitchen equipment, office equipment, computers and others.	Policy is 10 years old and does not reflect latest ENERGY STAR requirements.	14B	7/27/2007	☐
Central Office -- Hazardous Materials						
Asbestos Records	2	School maintains records of each preventive measure and response action taken for friable and nonfriable asbestos-containing building material as well as records of the persons performing the actions.	Records were difficult to locate, and in some cases missing.	222A	8/25/2007	☐

Monday, October 29, 2007 Page 1 of 2

5.4.2 Printing the Recommendations Package

Upon generating the recommendations package, each of the three documents is opened in preview mode. From the preview screen, the user can either print hard copies of each report, or, with a program like Adobe Acrobat, save them in electronic format. To facilitate Email communication and electronic document storage, it is highly recommended that districts provide assessors with a full version of Adobe Acrobat (available for purchase at www.adobe.com).

1. To print each document in hard copy format, select "Print" from the button bar, select a printer, then press "OK."

2. To save each document as a PDF file using Adobe Acrobat, select "Print" from the File menu, select "Adobe PDF" as the printer, then press "OK." The user will be asked to supply a file name and location for each PDF file, after which he or she should press "Save."

3. Select "Close" from the button bar.

4. Repeat steps 1-3 above for each of the three documents in the recommendations package.

5. Click on the "Save and Return to Facility Assessment Summary" button to return to the Facility Assessment Summary page.

6. Click on the "Save and Return to Facility Selection" button to return to the Facility Selection menu.

7. Click on the "Save and Return to Main Menu" button to return to Main Menu.

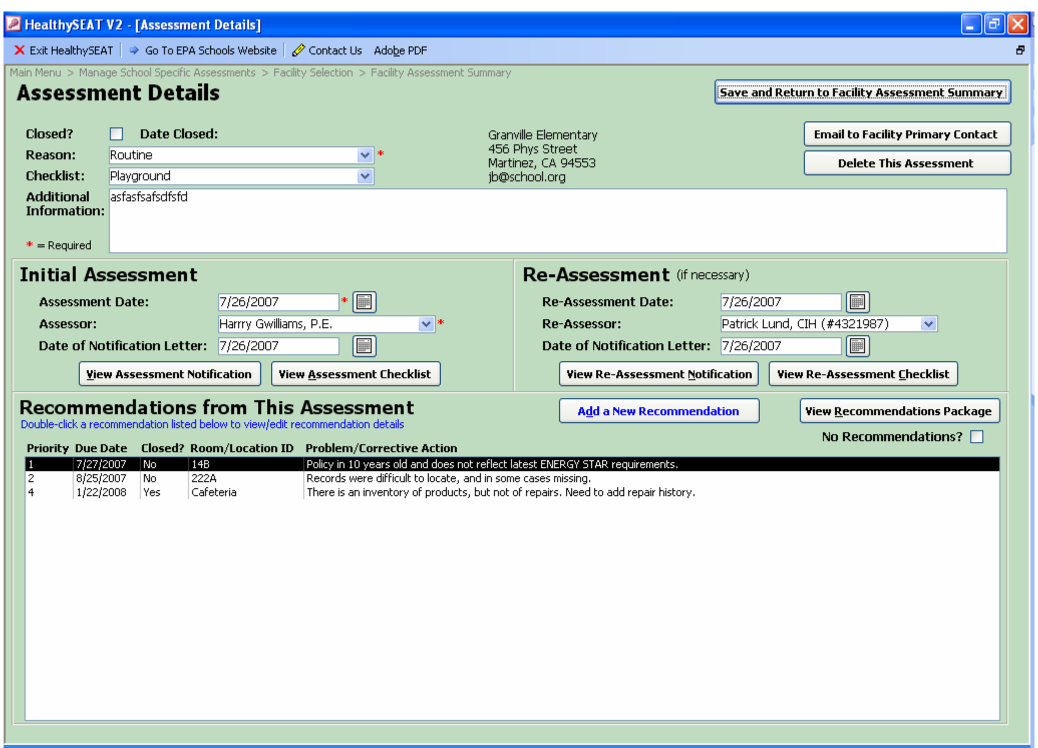
8. Compile the cover letter, Recommendation Notice, and the optional Self-Certification Form into one package. Send the package to the primary contact of the school facility and the facility contact, ideally within one week of completing the assessment.

5.5 Re-Assessment Notification

The goal of an initial assessment is to identify where assessment standards are not being met at a school facility, and to make recommendations for resolving those problems. Each recommendation, when implemented, must be closed. When all recommendations for a particular assessment have been closed, the assessment itself is then closed.

If the district makes use of the Self-Certification Form, many recommendations can be closed based on the signature of the facility primary contact. Nevertheless, there may be times when a re-assessment is necessary. During such a re-assessment, the focus is on verification that all open recommendations have been implemented.

HealthySEAT provides functionality to manage re-assessments. The required options appear on the Assessment Details form.

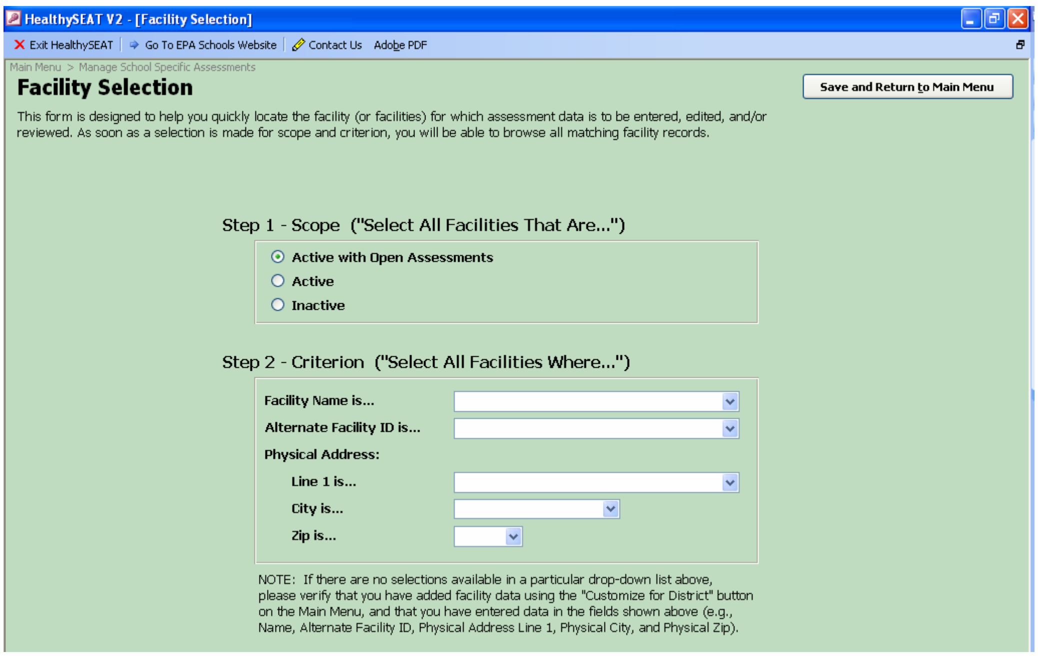


Just like preparing for an initial assessment, the re-assessment process involves notifying the school facility in advance about the upcoming visit of the assessor, and the specific recommendations that the assessor will be following up on. The following subsections discuss the re-assessment process.

5.5.1 Generate and Print the Re-Assessment Notification Letter

1. From the Main Menu of HealthySEAT, click on the "Manage School-Specific Assessments" button.

2. From the Facility Selection screen, under Step 1 – Scope, select "Active with Open Assessments." Under Step 2 – Criterion, select the facility that will be re-assessed using the "Facility Name is…" drop-down list.



3. On the Facility Assessment summary screen, in the table under "Assessments for This Facility," double-click the original assessment record upon which the re-assessment will be based.

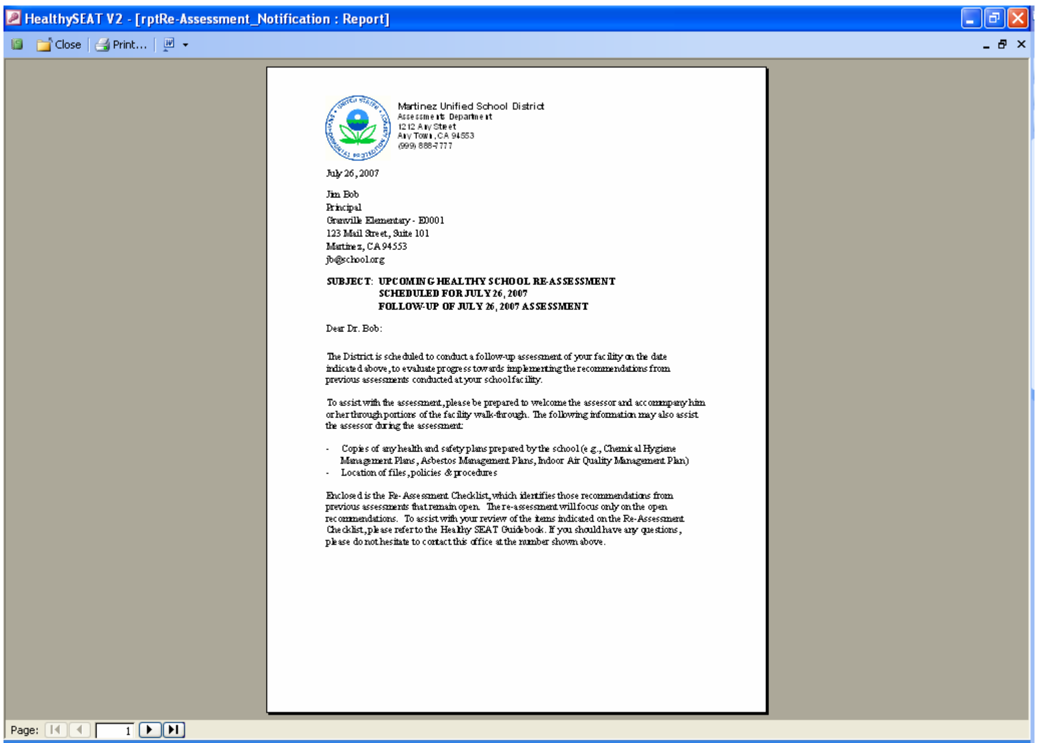
4. On the Assessment Details screen, the re-assessment options are organized under the heading "Re-Assessment (if necessary)".

5. Select the re-assessment date using the calendar button next to the Re-Assessment Date field. After selecting a date from the pop-up window, click "OK." This is the date on which the assessor is scheduled to visit the school facility for the re-assessment.

6. Select the assessor who will conduct the re-assessment using the Re-Assessor drop-down list.

7. Select the date when the re-assessment notification letter is to be sent using the drop-down list next to the "Date of Notification Letter" field. After selecting a date from the pop-up window, click "OK."

8. To generate a re-assessment notification letter, click on the "View Re-Assessment Notification" button. The standard "RE-ASSESSMENT_NOTIFICATION" letter, tailored for this particular re-assessment, will be presented in preview mode.



Verify that the information on the letter is correct. If the information is incorrect, refer to Section 4.2.4 to modify the re-assessment notification letter language. If the letter looks correct, print it using the Print button on the button bar.

To generate a hard copy of the letter, which can be mailed, select a printer and press "OK." NOTE: If a full version of Adobe Acrobat is installed on the computer, the letter may alternatively be saved as a PDF (portable document format) file by selecting "Adobe PDF" as the printer.

9. Use the "Close" button on the button bar to return to the Assessment Details screen.

5.5.2 Generate and Print the Re-Assessment Checklist

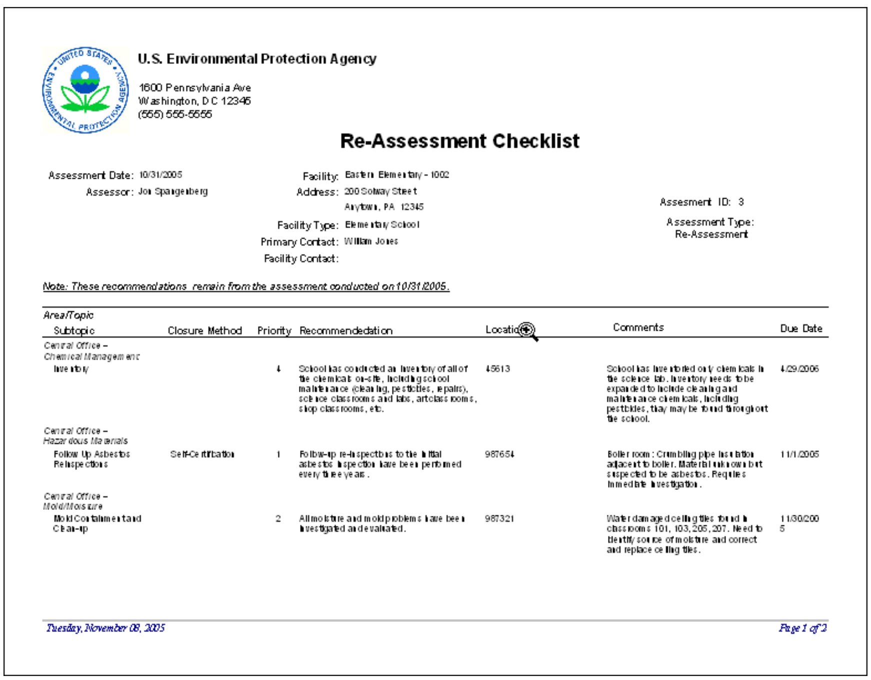
The re-assessment has now been successfully planned, and the re-assessment notification letter generated. The next step is to prepare the assessor for the re-assessment, which can either be done at the same time the letter is generated (preferable), or any time before the re-assessment. For the sake of this example, we will assume that the re-assessment checklist is generated immediately following the generation of the re-assessment notification letter. Hence, the user remains on the "Assessment Details" screen.

1. The Re-Assessment Checklist can only be generated after the "Re-Assessment Date," "Re-Assessor" and "Date of Notification Letter" fields have been filled in.

2. To generate a re-assessment checklist, click on the "View Re-Assessment Checklist" button. A re-assessment checklist that contains only the open recommendation for this assessment is presented in preview mode.

   Verify that the information on the checklist is correct. If so, print it using the Print button on the button bar.

   To generate a hard copy of the checklist, which can be mailed, select a printer and press "OK." NOTE: If a full version of Adobe Acrobat is installed on the computer, the checklist may alternatively be saved as a PDF (portable document format) file by selecting "Adobe PDF" as the printer.



U.S. Environmental Protection Agency

1600 Pennsylvania Ave
Washington, DC 12345
(555) 555-5555

Re-Assessment Checklist

Assessment Date: 10/31/2005
Assessor: Jon Spangenberg

Facility: Eastern Elementary - 1002
Address: 200 Solway Street
Anytown, PA 12345
Facility Type: Elementary School
Primary Contact: William Jones
Facility Contact:

Assesment ID: 3
Assessment Type: Re-Assessment

Note: These recommendations remain from the assessment conducted on 10/31/2005.

Area/Topic Subtopic	Closure Method	Priority	Recommendedation	Location	Comments	Due Date
Central Office – Chemical Management						
Inventory		4	School has conducted an inventory of all of the chemicals on-site, including school maintenance (cleaning, pesticides, repairs), science classrooms and labs, art class rooms, shop classrooms, etc.	45613	School has inventoried only chemicals in the science lab. Inventory needs to be expanded to include cleaning and maintenance chemicals, including pesticides, that may be found throughout the school.	4/29/2006
Central Office – Hazardous Materials						
Follow Up Asbestos Reinspections	Self-Certification	1	Follow-up re-inspections to the initial asbestos inspection have been performed every three years.	987654	Boiler room: Crumbling pipe insulation adjacent to boiler. Material unknown but suspected to be asbestos. Requires immediate investigation.	11/1/2005
Central Office – Mold/Moisture						
Mold Containment and Clean-up		2	All moisture and mold problems have been investigated and evaluated.	987321	Water damaged ceiling tiles found in classrooms 101, 103, 205, 207. Need to identify source of moisture and correct and replace ceiling tiles.	11/30/2005

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3. Compile the Re-Assessment Notification Letter and the Re-Assessment Checklist. Send the package to the facility scheduled for re-assessment at least two weeks prior to the anticipated re-assessment date. This will notify the school about the upcoming re-assessment and allow the school to prepare necessary materials for the assessor and become familiar with the re-assessment process.

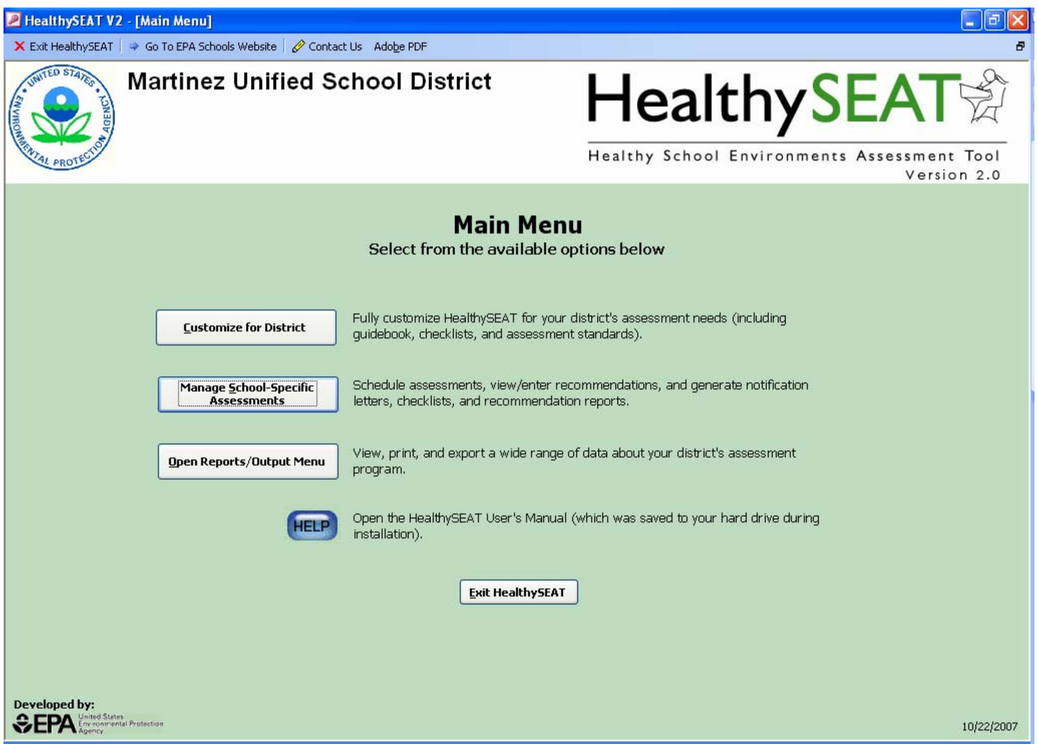
5.6 Closing Recommendations and Assessments

Within HealthySEAT there are two ways to close out an open recommendation: 1) through self-certification, or 2) by conducting a re-assessment. Upon receipt of a returned Self-Certification Recommendations form, or after completing a re-assessment of a school facility, the assessor may find that previously identified recommendations have now been implemented. Thus, the recommendations can be "closed" to indicate resolution.

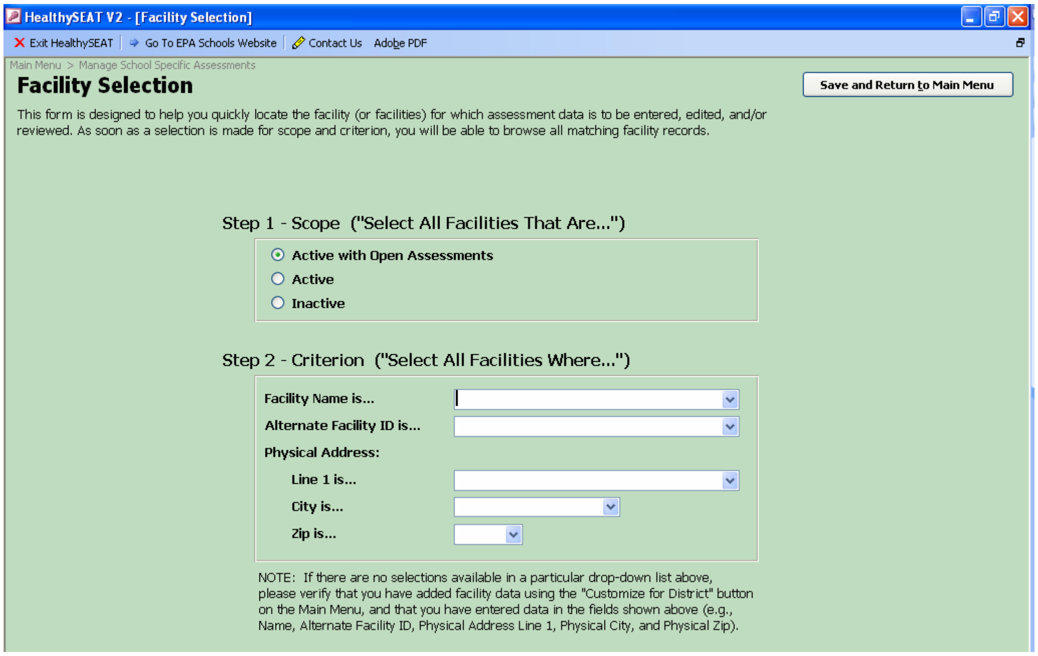
5.6.1 Closing a Recommendation

To "close" a recommendation, complete the following steps.

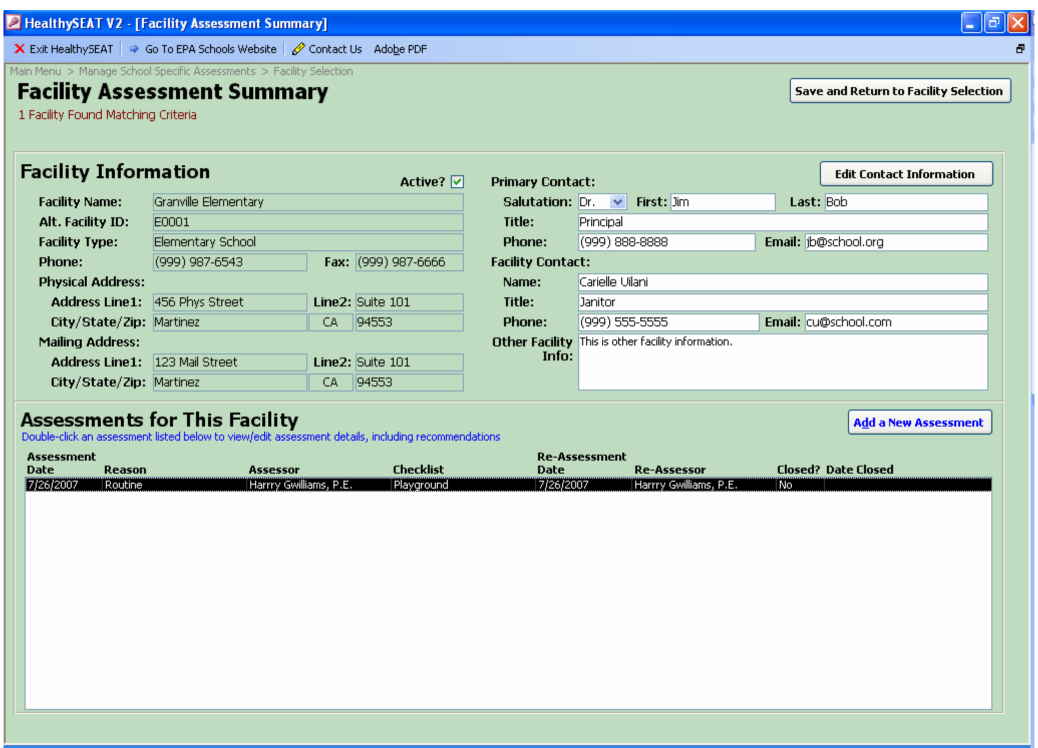
1. From the Main Menu, click on the "Manage School-Specific Assessments" button.



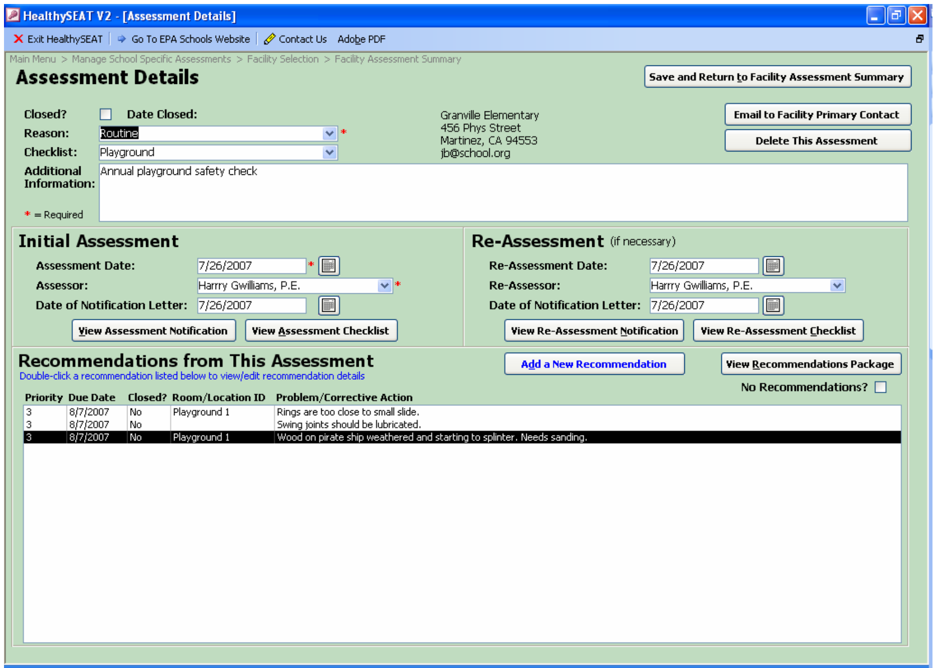
2. On the Facility Selection screen, under Step 1 – Scope, select "Active with Open Assessments." Under Step 2 – Criterion, select the name of the facility from the "Facility Name is…" drop-down list.



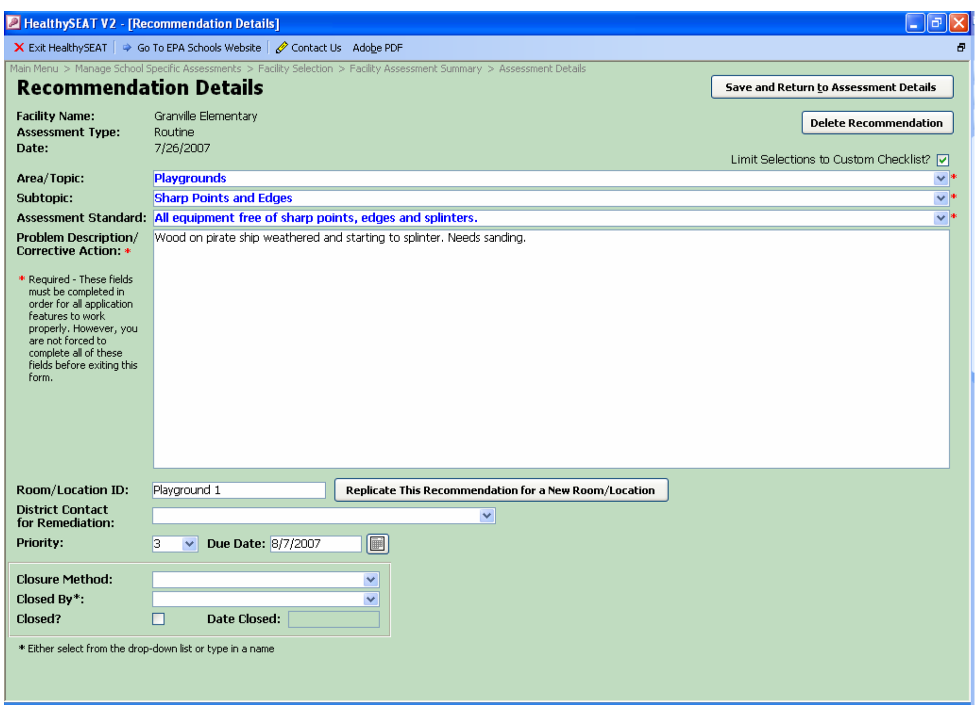
3. On the Facility Assessment Summary screen, double-click the open assessment from the list of "Assessments for This Facility" at the bottom of the screen.



4. On the Assessment Details screen, double-click the open recommendation from the list of "Recommendations from This Assessment" at the bottom.



5. On the "Recommendation Details" screen, below the "Priority" and "Due Date" fields, select the **Closure Method** (self-certification or re-assessment) from the drop-down list. This indicates whether an assessor verified implementation of the recommendation during a re-assessment, or whether the facility primary contact certified that the recommendation was implemented.



6. On the Recommendation Details screen, in the **Closed By** field, enter the name of the person who certified that the recommendation was implemented. If an assessor confirmed the implementation during a re-assessment, select the name of the assessor from the drop-down list. If the recommendation was closed by self-certification, type in the name of the facility primary contact, or the name of the person who signed the Self-Certification Form, then press the Tab key on the keyboard.

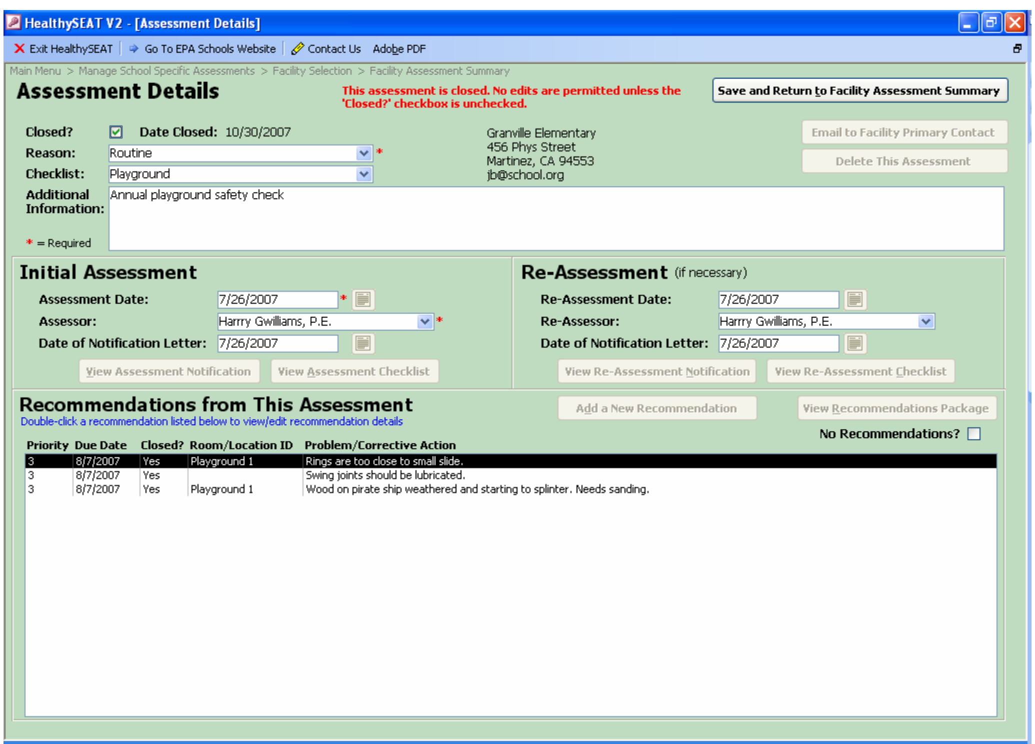
7. As soon as Closure Method and Date Closed are entered, the "**Closed?**" check box will automatically be checked, and the current date will be entered in the **Date Closed** field. The recommendation is now closed.

8. Click on the "Save and Return to Assessment Details" to return to the Assessment Details screen.

9. Repeat steps 4-8 above to record closures of any other recommendations.

5.6.2 Closing an Assessment

When all recommendations from an assessment have been closed, the assessment record itself should be closed to indicate that no further action is required. HealthySEAT has been designed to close assessments automatically. When the last recommendation for an assessment is closed, HealthySEAT will automatically check the "**Closed?**" check box on the Assessment Details screen, and set the **Date Closed** to the current date.



A closed assessment may be re-opened by clicking on the Closed? check box, which will un-check the box and clear the Date Closed field. However, the user will then have to manually close the assessment later by clicking on the Closed? check box. Whenever the Closed? check box is checked, the Date Closed will be set to the current date.

After verifying that the assessment is closed, click on the "Save and Return to Facility Assessment Summary" button to return to the Facility Assessment Summary screen.

Section 6
Reports/Output Menu

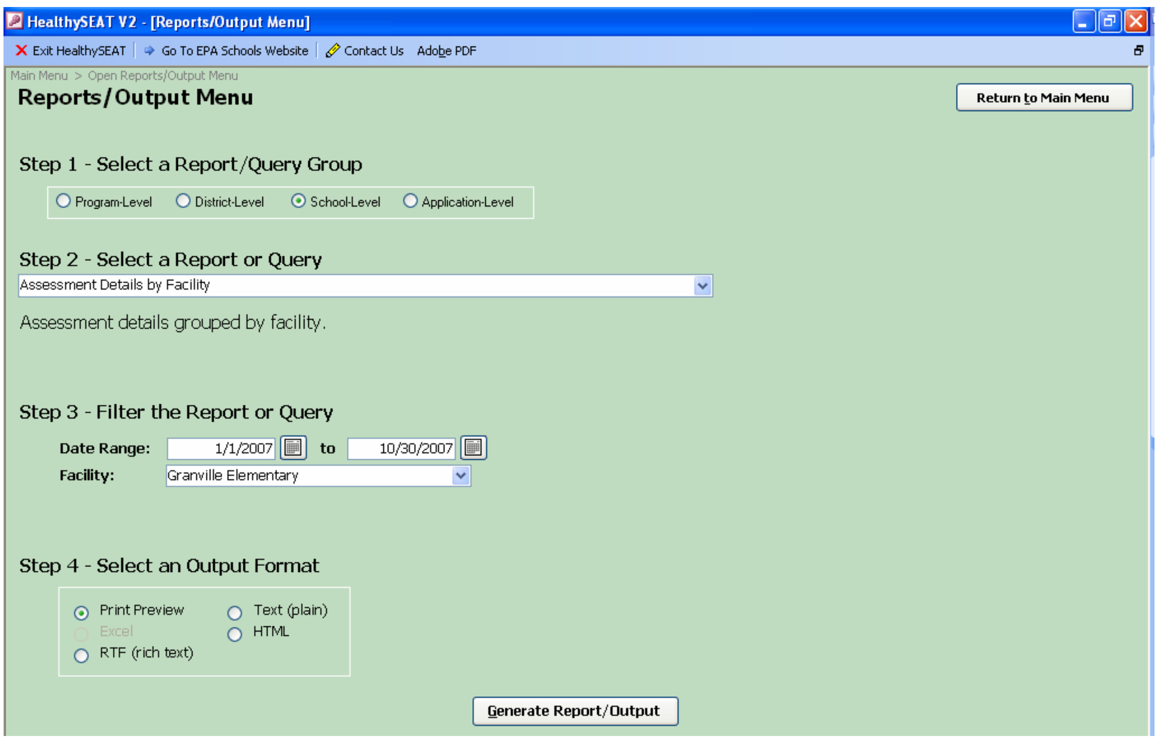
Reminder:

Make frequent copies of your data file (BE_HSEAT.mdb).

6.1 Introduction

HealthySEAT has built-in functions to generate reports and output based on facility assessment results and information contained in the Customize for District process. The reports are designed to allow districts to aggregate and manage the information developed through the assessment process, and to help in identifying, evaluating, preventing, and remedying environmental health hazards. Use of, and access to, these report features is entirely at the discretion of the district.

All reports/output options are provided on the Reports/Output Menu, which is accessible from the "Open Reports/Output Menu" button on the Main Menu.



6.2 Report Selection and Configuration

The Reports/Output Menu provides a three-, or in some cases four-, step process for report selection and generation.

6.2.1 Step 1 – Select a Report/Query Group

The first step involves selecting a report or query group. The choices are as follows:

- *Program-Level* – This group includes reports and/or queries that pertain to the district's overall assessment program.

- ***District-Level*** – This group includes reports and/or queries that that are meaningful to district-level staff, including those that aggregate results from multiple school facilities.

- ***School-Level*** – This group includes reports and/or queries that are meaningful to school staff, and generally include the most detail about specific assessments and recommendations.

- ***Application-Level*** – This group includes reports and/or queries that related to the HealthySEAT application and configuration. These include reports on users and application errors.

6.2.2 Step 2 – Select a Report or Query

Step two of the report generation process involves selection of the report that the user wants to generate, or the query to be exported from HealthySEAT.

The selections are made from a drop-down list, which is pre-determined based on the report/group selected in Step 1, as follows:

Program-Level Reports

- *Master Checklist* - This report displays all of the areas/topics, subtopics, and assessment standards included in the district's Assessment Guidebook, formatted as a checklist.

- *List of Custom Checklists* - This report displays a list of the custom checklists that have been created, the notification letters associated with each, and the total number of standards included.

- *Notification Letters* - This report displays key information about each notification letter. The first three letters are standard letters, which may be customized but not deleted. The other letters are custom letters created by the district.

- *Assessment Guidebook* - This report displays detailed information for each assessment standard included in the district's assessment program. Assessment standards are organized by area/topic and subtopic.

- *Assessment Guidebook Table of Contents* - This report displays the table of contents to accompany the Assessment Guidebook. (Note: before generating this report, first generate the Assessment Guidebook report in Print Preview format and navigate to last page).

- *Assessment Standards NOT Included* - This is an Assessment Guidebook-style report that includes only assessment standards that are NOT included in the District assessment program.

- *Regulatory Assessment Standards* - This is an Assessment Guidebook-style report that includes only assessment standards that are or may be regulatory requirements.

District-Level Reports

- *Number of Open Recommendations by Facility* - This report displays a list of all district facilities. For each facility, the number of open recommendations at each priority level is shown, with district totals at the bottom. This report may be filtered by facility.

- *Total Number of Recommendations by Facility* - This report displays a list of all district facilities. For each facility, the number of recommendations at each priority level is shown, with district totals at the bottom. This report may be filtered by facility.

- *Total Number of Recommendations by Area/Topic* - This report displays a list of all area/topics included in the district's assessment program. For each area/topic, the number of recommendations at each priority level is shown, with district totals at the bottom.

- *Total Number of Recommendations by Subtopic* - This report displays a list of all area/topics and subtopics included in the district's assessment program. For each area/topic, and each subtopic, the number of recommendations at each priority level is shown, with district totals at the bottom.

- *Total Number of Recommendations by Assessment Standard* - This report displays a list of all area/topics, subtopics, and assessment standards included in the district's assessment program. For each area/topic, each subtopic, and each assessment standard, the number of recommendations at each priority level is shown, with District totals at the bottom.

- *District Policies/Programs* - This report displays the status of district-level policies and programs.

- *District Assessors* - This report displays detailed information on all district assessors.

- *District Contacts for Remediation* - This report displays detailed information on all district contacts for remediation.

- *Scheduled Assessment Reminders* - This report displays a list of open assessments that have either an initial assessment or re-assessment scheduled within a pre-configured number of days from the current date. This report may be filtered by facility.

- *Assessment Frequency Reminders* - This report displays a list of active facilities that either have not been assessed within a pre-configured target frequency, or have never been assessed. This report may be filtered by facility.

School-Level Reports

- *Assessment Details by Facility* - This report contains assessment details grouped by facility. This report may be filtered by date range and/or facility.

- *Assessment Details (Export)* - This query includes assessment details, sorted by facility and assessment date, formatted for export to Microsoft Excel. This query may be filtered by date range and/or facility.

- *Recommendations Details by Facility* - Recommendations details grouped by facility and assessment. This report may be filtered by date range and/or facility.

- *Recommendations Details (Export)* - This query includes recommendation details, sorted by facility and assessment date, formatted for export to Microsoft Excel. This query may be filtered by date range and/or facility.

- *Open Recommendations by Facility* - Open recommendations details grouped by facility and assessment. This report may be filtered by date range and/or facility.

- *Basic Facility Information (Export)* - This query includes basic facility information, formatted for export to Microsoft Excel. This query may be filtered by facility.

- *Additional Facility Information (Export)* - This query includes additional facility information, formatted for export to Microsoft Excel. This query may be filtered by facility.

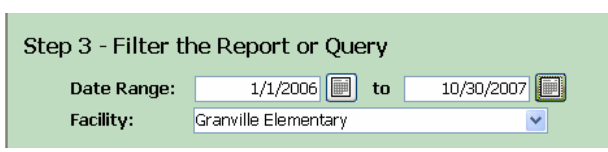
Application-Level Reports

- *HealthySEAT Users* - This report displays details for all non-administrator HealthySEAT users.

- *HealthySEAT Application Error Report* - This report shows all application errors generated from the local installation of HealthySEAT, with the most recent errors shown first. It is intended to serve only as a trouble-shooting aid.

6.2.3 Filtering the Report or Query

If the selected report or query can be filtered, then Step 3 will involve selecting the filter parameters, which may include a date range and/or a facility name.



Filtering by a Date Range

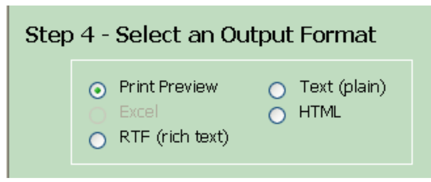
To filter the report or query output by a specific date range, select a date range by clicking on the calendar icons to the right of the starting (left) and ending (right) date fields. If a start date for the range is not specified it will default to January 1, 2006. If an end date for the range is not selected it will default to the current date.

Filtering by a Facility

To filter the report or query by a specific facility, select the facility name from the Facility drop-down list.

6.2.4 Selecting an Output Format

Depending on whether filter parameters are available for the selected query or report, this will either be Step 3 or Step 4. The user must click the circle to the left of the output format desired.



There are five possible selections, including:

- *Print Preview*: With Print Preview, the report or query is prepared for printing and presented to the user in a preview window, from which it can be printed. Use this option to print to PDF or to a local or network printer.

- *Tex (plain)t*: With the Text View, the report or query is output as a delimited ASCII text file, the name and location of which the user is prompted to select.

- *Excel*: With Excel, the report or query is output to a Microsoft Excel (.XLS) file, the name and location of which the user is prompted to select. This output format is best suited for queries.

- *RTF (rich text)*: With RTF, the report or query is output to a Rich Text Format (.RTF) file, the name and location of which the user is prompted to select. This output format is best suited for reports, and includes special formatting used by word processing programs such as Microsoft Word.

- *HTML*: With HTML, the report or query is output to one or more Hyper Text Markup Language (.HTML) files, the name and location of which the user is prompted to select. This output format is best suited for reports that are intended to be posted on a website.

Not all of these selections are available for all queries or reports. The available choices have been pre-configured for each report or query.

6.3 Generating the Report/Output

Once the configuration steps outlined in Section 6.2 have been completed, the final step in generating the report or output is to press the “Generate Report/Output” button at the bottom of the screen.

Depending on the output format selected, the user will either be presented with a report preview, or asked to supply a file name and location. If a file name and location are supplied, be sure to note them down so that the report can be retrieved later.

If presented with a report in preview mode, use the Print button in the button bar to print it, then use the Close button in the button bar to close the preview window and return to the Reports/Output Menu.

Section 7
Advanced Users

Reminder:

Make frequent copies of your data file (BE_HSEAT.mdb).

7.1 HealthySEAT Database Configuration

HealthySEAT was developed using Microsoft Office Access 2003, and makes use of two distinct databases – the front end database and the back end database. Both databases are in Access 2002/2003 format.

7.1.1 The Front End Database

The front end database contains all forms, queries, reports and programming code. It is called HSEATv2.mdb and is found in the installation folder (c:\Program Files\HealthySEAT2 by default). This database is compiled (i.e., locked such that users cannot add any additional tables, queries, reports, modules, macros or forms) for two primary reasons:

- To prevent users from inadvertently editing it and causing HealthySEAT to stop working properly.
- To preserve the core functionality of HealthySEAT so that future updates can be supplied to the HealthySEAT user community.

Because HealthySEAT is in the public domain, an uncompiled version of the HealthySEAT front end database may be obtained from EPA. However, be aware that changes to the HealthySEAT front end will not be preserved should future HealthySEAT updates be downloaded and installed from the EPA web site. As a result, users requesting an uncompiled HealthySEAT front end database will be required to acknowledge the potential ramifications.

7.1.2 The Back End Database

The back end database contains most data tables, including those that store data for the assessment guidebook, master checklist, custom checklists, facilities, assessors, assessments, recommendations, etc. It is called BE_HSEAT.mdb. In a single-user setup, the back end database is generally located in a subfolder of the installation folder. In a multi-user installation, however, the back end database will likely be located in a shared network folder (see Section 7.2).

The back end database is not compiled or protected. It may be opened using a full (i.e. non-Runtime) version of Microsoft Office Access 2003. Users may add new objects to the back end database. However, caution should be exercised when editing existing tables. Existing fields in existing tables should not be changed, as these changes could adversely affect the HealthySEAT application.

When an updated version of HealthySEAT is installed, the existing back end database is updated as needed to support new or modified functionality. Thus, the back end database is preserved, along with any new tables, queries, reports, or programming code that may have been added.

Because of the importance of the data contained in the back end database, it is recommended that it be backed up regularly, especially before any user modifications are made to it (see Section 8.4).

7.2 Configuring HealthySEAT for Multi-user Operation

HealthySEAT supports multi-user operation, even though it is set up for single-user operation by default. The only difference between single-user operation and multi-user operation is the sharing of a back end database.

Whenever HealthySEAT is installed, whether for the first time or as an update, a new (empty) back end database corresponding to the current HealthySEAT version is installed locally in a subfolder of the installation folder. The name of the subfolder containing the new back end database corresponds to the HealthySEAT version (e.g., V2). The first time HealthySEAT is opened after installation, it will establish a connection to the new (empty) database.

To configure HealthySEAT for multi-user operation, the back end database must be located in a folder accessible to all HealthySEAT users. Then, each user must configure their HealthySEAT application to link to the shared back end database. The "Re-establish Database Connection" option on the "Customize for District" menu was designed for this purpose (see Section 4.3.1). This must be repeated each time an updated version of HealthySEAT is installed, or if the back end database file is relocated.

7.3 Importing Data

Facility, Additional Facility Data, Assessor, User, and District Remediation Contacts information can be imported or linked into the HealthySEAT back end database from a variety of sources (e.g., Excel, Access, SQL Server, Oracle). There are a variety of ways to do this, though it should only be done by someone experienced with databases and with Microsoft Access.

The table that stores facility information is called tblFacilities. The fields in **tblFacilities** are described briefly in the following table:

Field Name	Data Type	Description
Facility_ID	autonumber	The value of this field is automatically determined by Microsoft Access when a new record is created
Facility	Text (255)	The primary facility identifier (it must be unique)
Facility_ID2	Text (255)	The alternate facility identifier
District_ID	Long Integer	The identifier of the District (defaults to 1)
Address	Text (255)	Line 1 of the facility mailing address
Address2	Text (255)	Line 2 of the facility mailing address
City	Text (255)	Name of the city, for mailing address

Field Name	Data Type	Description
State	Text(2)	Two-letter postal abbreviation for the state or U.S. Territory, for mailing address
Zip	Text (2)	ZIP code, for mailing address
Phone	Text (50)	Main phone number for facility
Fax	Text (50)	Main fax number for facility
Salutation	Text (50)	Salutation for primary contact (e.g., Dr.)
Primary_Contact_First	Text (50)	First name of primary contact
Primary_Contact_Last	Text (50)	Last name of primary contact
Primary_Contact_Title	Text (100)	Title of primary contact
Facility_Contact	Text (50)	Full name of facility contact
Facility_Type	Long Integer	A number indicating the type of facility: 1=Multi User 2=Elementary School 3=Middle School 4=High School 5=Bus Depot 6=Administration 7=Industrial 8=Other 9=0=Career/Vocational
Facility_Email	Text (255)	Email address for primary contact
Enrollment	Memo	Additional facility information (e.g., enrollment, capacity)
Active	Yes/No	Indication of whether facility is active (defaults to Yes, or -1)
Primary_Contact_Phone	Text (50)	Phone number of primary contact
Facility_Contact_Title	Text (100)	Title of facility contact
Facility_Contact_Phone	Text (50)	Phone number of facility contact
Facility_Contact_Email	Text (255)	Email address for facility contact
Physical_Address	Text (255)	Line 1 of the facility physical address
Physical_Address2	Text (255)	Line 2 of the facility physical address
Physical_City	Text (255)	Name of the city, for physical address
Physical_State	Text (2)	Two-letter postal abbreviation for the state or U.S. Territory, for physical address
Physical_Zip	Text (50)	ZIP code, for physical address
Physical_County	Text (100)	County name, for physical address

The index to additional facility information can also be loaded directly. The table is called tblFacility_AdditionalInfo. This information must be loaded after the facility information, however, because one of the required fields in tblFacility_AdditionalInfo (called FacilityID) links directly to the Facility_ID field (an autonumber field) that is populated by Access when loading facility data.

The table that stores additional facility information is called tblFacility_AdditionalInfo. The fields in **tblFacility_AdditionalInfo** are described briefly below:

Field Name	Data Type	Description
ID	autonumber	The value of this field is automatically determined by Microsoft Access when a new record is created
Facility_ID	Long Integer	The primary facility identifier (it must be unique)
FileRef	Text (255)	User-defined field that can store up to 255 characters of data
Location	Text (255)	User-defined field that can store up to 255 characters of data
Description	Text (255)	User-defined field that can store up to 255 characters of data
SortOrder	Text (50)	User-defined field that can store up to 50 characters of data

IMPORTANT: When importing data into tblFacility_AdditionalInfo, each record must have its Facility_ID field set to the Facility_ID of the corresponding facility record in tblFacilities.

The index of users can also be loaded directly into HealthySEAT. The table that stores user information is called tblUsers. The fields in **tblUsers** are described briefly below:

Field Name	Data Type	Description
ID	autonumber	The value of this field is automatically determined by Microsoft Access when a new record is created
zUserName	Text (255)	The User Name that the user will use to login to HealthySEAT
zPassword	Text (32)	MD5 digest of user's password (value of 4cb9c8a8048fd02294477fcb1a41191a corresponds to "changeme", which is the default password)
Fname	Text (50)	User's first name
Lname	Text (50)	User's last name
zLevel	Long Integer	User's permission level (1 = Admin, 2 = Assessor, 3 = Viewer)
Title	Text (50)	User's title
Organization	Text (50)	User's organization membership
Phone	Text (50)	Phone number of user
Fax	Text (50)	Fax number of user
Email	Text (255)	Email address of user
Address1	Text (50)	Address Line one
Address2	Text (50)	Address line two of User (Mail Stop)
City	Text (50)	City of User
State	Text (50)	State of User
Zip	Text (50)	Zip code of User
LastLoginDate	DateTime	Date-Time stamp that shows user's last login date and time

The index of assessors can also be loaded directly into HealthySEAT. The table that stores assessor information is called tblAssessors. The fields in **tblAssessors** are described briefly below:

Field Name	Data Type	Description
ID	autonumber	The value of this field is automatically determined by Microsoft Access when a new record is created
Assessor_ID	Long Integer	Not used. Defaults to 0.
UserID	Long Integer	Not used. Defaults to 0.
Fname	Text (50)	Assessor's First Name
Lname	Text (50)	Assessor's Last Name
Level	Long Integer	Not used. Defaults to 0.
Title	Text (50)	Assessor's Title
Organization	Text (50)	Assessor's Department/Organization
Phone	Text (50)	Assessor's main phone number
Fax	Text (50)	Assessor's fax number
Email	Text (255)	Assessor's Email address
Address1	Text (50)	Line 1 of assessor's address
Address2	Text (50)	Line 2 of assessor's address (Mail Stop)
City	Text (50)	Name of city, for assessor's address
State	Text (50)	Two letter state code, for assessor's address
Zip	Text (50)	ZIP code, for assessor's address
CC1	Text (255)	Name of person(s) to receive carbon copies of correspondence from this assessor.
CC2	Text (255)	Name of person(s) to receive carbon copies of correspondence from this assessor.
CC3	Text (255)	Name of person(s) to receive carbon copies of correspondence from this assessor.
CC4	Text (255)	Name of person(s) to receive carbon copies of correspondence from this assessor.
CC5	Text (255)	Name of person(s) to receive carbon copies of correspondence from this assessor.
CC6	Text (255)	Not used.
Active	Yes/No	Indicates whether assessor is active (Yes (default) = -1; No = 0)
Assessor	Text (255)	Assessor's full name (First + Last + Suffix)
MobilePhone	Text (50)	Assessor's mobile phone number
RespArea	Text (100)	Assessor's area(s) of responsibility
Suffix	Text (50)	Suffix for assessor (e.g., CIH #1234)

The index of district contacts for remediation can also be loaded directly into HealthySEAT. The table that stores contacts for remediation is called tblRemediationContacts. The fields in **tblRemediationContacts** are described briefly below:

Field Name	Data Type	Description
DCRID	autonumber	The value of this field is automatically determined by Microsoft Access when a new record is created
ContactName	Text (50)	The full name of remediation contact
Organization	Text (50)	Remediation contact's Department/Scope of Responsibility
Phone	Text (50)	Remediation contact's phone number
Fax	Text (50)	Remediation contact's fax number
Email	Text (50)	Remediation contact's email address
Address1	Text (50)	Line 1 of address
Address2	Text (50)	Line 2 of address (Mail Stop)
City	Text (50)	Name of city
State	Text (50)	Two letter state code
Zip	Text (50)	ZIP code
Active	Yes/No	Indication of whether Remediation contact is active (Yes (default) = -1; No = 0)

7.4 Integrating HealthySEAT Data with Other Applications

Because the HealthySEAT back end database is open, HealthySEAT data can be integrated with a wide variety of other applications and databases. In fact, custom functionality, queries, reports, etc. can be developed by building a separate application that links to the HealthySEAT back end database tables.

Caution is needed when manipulating data in existing tables in the back end database, however, as this could interfere with core HealthySEAT functionality.

Section 8
Recommended Business Practices

> **Reminder:**
>
> Make frequent copies of your data file (BE_HSEAT.mdb).

In an effort to enhance the value of HealthySEAT for school districts and other potential users, the following recommended business practices are provided. Each of these practices offers suggestions to districts about how to further design a district-wide assessment program and tailor HealthySEAT to maximize its use and value in implementing the district's program.

8.1 Email Functionality

Many districts may be interested in using Email to communicate with the district assessments director, assessors, specific primary and facility contacts, and district contacts for remediation. Using Email to communicate between the district assessors and each school facility limits the amount of paperwork, reduces costs associated with mailings, and expedites communication between the district and each of its school facilities. While HealthySEAT is not an Email program, it has been designed with features that support the use of Email. For example, fields are included within HealthySEAT to store Email addresses for assessors, primary and facility contacts at each school facility, and district contacts for remediation. Additionally, starting with Version 2, HealthySEAT has a button on the Assessment Details screen that allows the user to open an email message addressed to the facility primary contact.

The following suggestions and recommendations will facilitate Email communication among district staff and administration.

8.1.1 Saving Letters and Reports as Electronic Files

To facilitate Email communications, it is important to use a file format that is ubiquitous, such as PDF (Portable Document Format), from Adobe, or RTF (Rich Text Format). It is strongly recommended that users of HealthySEAT obtain full versions of Adobe Acrobat so that they can easily save HealthySEAT letters and reports as PDF files.

The following example demonstrates several ways to save HealthySEAT letters or reports as electronic files. The same basic techniques can be applied throughout HealthySEAT.

1. From the Main Menu, click on the "Open Reports/Output Menu" button.

2. Step 1 – select "Program-Level".

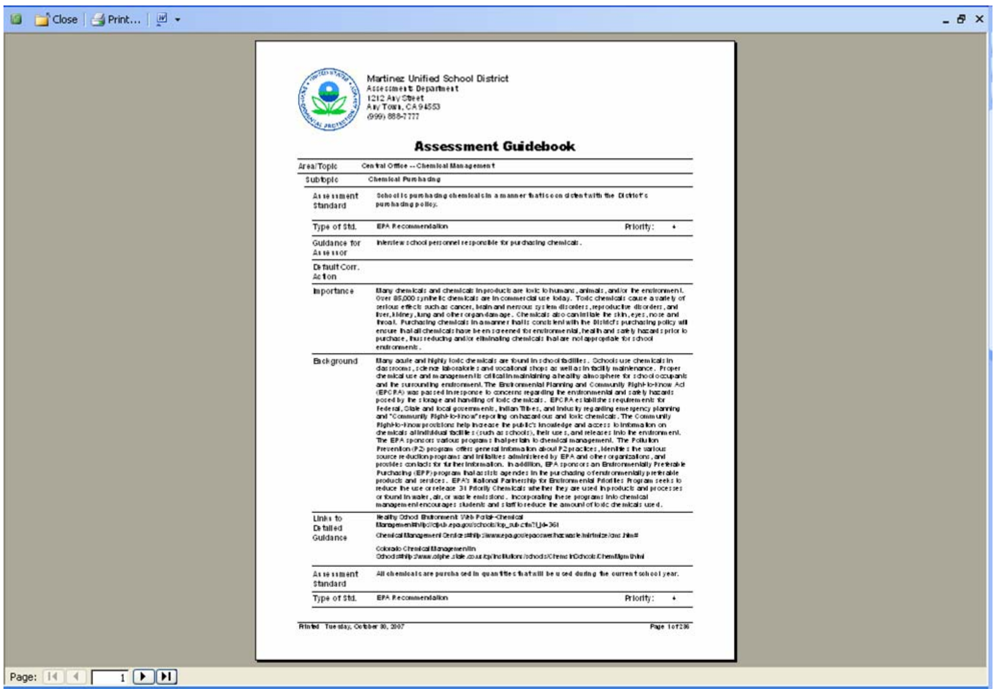
3. Step 2 – select "Assessment Guidebook" from the drop-down list.

4. Step 3 – select "Print Preview" as the output format. In the case of reports available from the Reports/Output Menu, other output formats can be selected

in this step. However, for the sake of demonstrating general functionality that applies throughout HealthySEAT, select Print Preview.

5. Click the “Generate Report/Output” button.

6. The Assessment Guidebook report will be presented in Print Preview mode. From this Print Preview window, there are two key ways to save the Assessment Guidebook report as an electronic file.



7. ***To save as a PDF file***: If a full version of Adobe Acrobat is installed, use the Print button on the button bar, select “Adobe PDF” from the list of available printers, click “OK”, pick a file name and location for the PDF file, then click “Save”. The report will be converted to a PDF file and placed in the location specified.

8. ***To save as an RTF file***: If Adobe Acrobat is unavailable, use the OfficeLinks button on the button bar, to output the report in RTF format. The report will automatically be saved according to the report name (in this case rpt_Assessment_Guidebook.rtf) and placed in the “My Documents” folder.

9. Press the Close button on the button bar to return to the Reports/Output Menu.

8.1.2 Adding Attachments to Emails

Once a letter or report is saved as an electronic file, it can easily be attached to an email. For example, to send an assessment notification Email to a facility primary contact, save the assessment notification letter and assessment checklist as electronic files, then attached them to an Email.

To help streamline this process, there is a button called "Email to Facility Primary Contact" on the Assessment Details screen. If the computer is configured for Email, and there is an Email address for the facility primary contact, this button will open a new Email message and address it to the facility primary contact. Attach the electronic files to the message, enter a message title, add some text to the Body of the email, add some CCs, and send the Email.

8.2 Additional Facility Information

For districts interested in storing additional information specific to each facility within the HealthySEAT database, a page has been provided where facility information can be catalogued. Districts can enter and store an unlimited number of references to additional information about the facility. For example, the location of environmental reports and documents; where to find photographs and images from previously conducted assessments; the existence of maps and campus layouts for planning and emergency response purposes; where material safety data sheets can be found; work order information; facility permit information; and any other information the district determines to be helpful and/or useful for cataloging in this central database location.

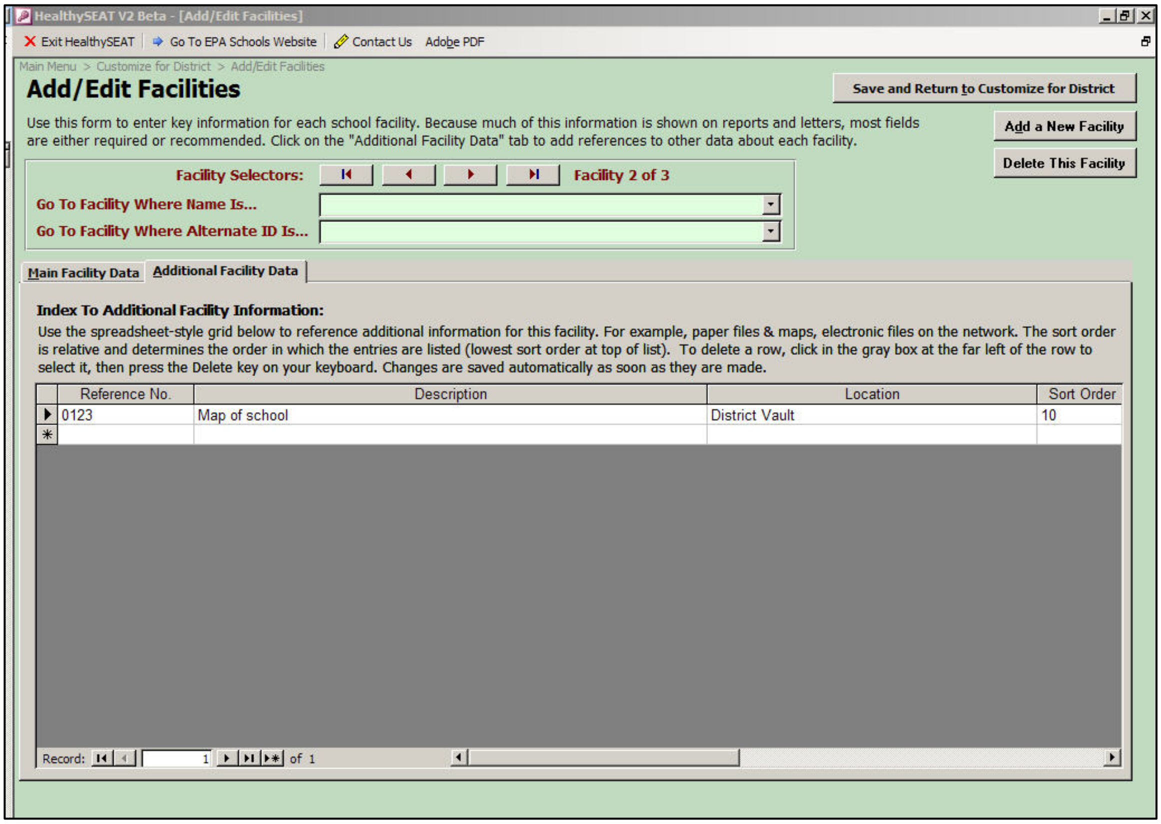
To access and utilize the "Additional Facility Information" page in the HealthySEAT database, complete the following steps:

1. From the Main Menu, click on the "Customize for District" button.

2. From the "Customize for District" menu, click on the "Add/Edit Facilities" button.

3. On the Facility Section screen, under Step 1 – Scope, select "Active." Under Step 2 – Criterion, select a facility from the "Facility Name is…" drop-down list.

4. On the "Add/Edit Facilities" page, click on the "Additional Facility Data" tab.



5. Determine what additional information the district would like to catalog on this page and use the “Reference No.,” “Description,” “Location,” and “Sort Order” fields to record the desired information about each data set, file, document, or set of files for the facility.

While these files and documents are not stored directly in the HealthySEAT database, this Additional Facility Data page provides a centralized location where references to additional facility information can be entered, catalogued and stored over time.

8.3 Backing Up and Restoring HealthySEAT Data

Assessment-related data and program customization information are stored in a “back end” database file called BE_HSEAT.mdb. It is highly recommended that this file be backed up on a regular basis. If the HealthySEAT “back end” database becomes corrupt, the district will need to revert to a recent non-corrupt backup, and any data modifications since that last backup will have to be repeated.

8.3.1 Database File Location

In a single-user HealthySEAT installation, the back end database file will usually be located on the local hard drive. In a multi-user or networked HealthySEAT installation, the production back end database file will most likely be located in a network folder, although there may be a back end database of the same name on the local hard drive.

If HealthySEAT is properly connected to the production back end database, the best way to determine the location of the back end database is to click on the "Re-Establish Database Connection" button on the Customize for District screen. The full path to the production back end database is displayed next to "Currently Connected To:" on the "Re-establish Database Connection" screen.

8.3.2 Backup Considerations

Access database files should be backed up when they are unopened (i.e., when no user is actively using HealthySEAT). Thus, it is recommended that backups be made at a time when the Administrator is certain no one has HealthySEAT open. The presence of a lock file called BE_HSEAT.ldb in the same folder as BE_HSEAT.mdb indicates that a user has HealthySEAT open. In such cases, the administrator should first backup both the .ldb and .mdb files as a set. Then, if the administrator can confirm that no one has HealthySEAT open, try deleting the .ldb file, after which the administrator should test to make sure that HealthySEAT functions properly.

Backups of the database can be made to another network folder (preferably on another hard drive or server) or to a CD-ROM. Because database corruption may not be detected immediately, it is recommended that the administrator maintain several backups.

8.3.3 Restoring a Backup

Follow these steps to restore a backup of the HealthySEAT database:

1. Make sure that no one is actively using HealthySEAT.

2. Locate the folder that contains the active HealthySEAT database file.

3. Rename the active database file to BE_HSEAT_[current date].mdb (and the lock file to BE_HSEAT_[current date].ldb if present).

4. Copy the BE_HSEAT.mdb file from the backup location to this folder (and the BE_HSEAT.ldb file if present in the backup set).

5. Open the HealthySEAT application and test to make sure that it is functioning properly. If not, use the "Re-establish Database Connection" option on the "Customize for District" menu to verify the connection to the correct database.

8.3.4 Repairing a Corrupt Database

If the HealthySEAT database becomes corrupt, and the administrator does not have a non-corrupt backup to restore, the administrator may be able to repair the corrupt database. Seek direction from Microsoft and/or the district's IT staff before attempting this. The user will likely need a full version of Microsoft Access 2003 to complete this repair. In the event that the database has to be re-built, be certain that the format of the re-built database is Access 2002/2003.

Section 9
General Reference Guide

Reminder:

Make frequent copies of your data file (BE_HSEAT.mdb).

The following additional information is provided to assist users in trouble shooting any questions and/or issues that arise during the use of HealthySEAT.

9.1 Trouble Shooting HealthySEAT

The HealthySEAT application has been designed to be a robust data management application, but in the event that problems arise, included below are some steps to help trouble shoot the application.

9.1.1 Database Connectivity

***Problem:* The HealthySEAT application cannot successfully connect to the back end database.**

Try This: Verify with an IT or HealthySEAT administrator that the file location of the back end database has not changed. If the location of the back end database has changed use the "browse" button located on the "Re-establish Database Connection" screen to locate and connect to the database's new location.

***Problem:* Version Upgrade**

Try This: If attempts to update the existing back end database to the current version fail, verify that no other users are connected, or attempting to connect, to the back end database. Exclusive access to the backend database is required for the upgrade process to succeed.

9.1.2 Importing Back End Data

***Problem:* Data imports fail when attempting to import data into the back end database.**

Try This: Verify that the data types match for both the target and source database tables. Be sure that fields of autonumber type are not included in the import data set, as these must be assigned by Access.

9.1.3 Security

***Problem:* Attempts to login to HealthySEAT fail**

Try This: Both the username and password are case sensitive for HealthySEAT; make sure that the correct case is being used for both. If it is a new installation of HealthySEAT, and the database has not yet been configured, try a user name of “admin” and a password of “admin”.

Contact an IT or HealthySEAT administrator to have your password reset to the default password, which is “changeme”.

9.2 Acronyms/Abbreviations

ACM: Asbestos containing material

ACBM: Asbestos containing building material

AHERA: Asbestos Hazard Emergency Response Act

AMP: Asbestos Management Plan

AQI: Air Quality Index

ASHRAE: American Society of Heating, Refrigerating and Air-Conditioning Engineers

AST: aboveground storage tank

CAA: Clean Air Act

CADD: Computer Aided Design and Drafting

CAEPA: California Environmental Protection Agency

CDC: Centers for Disease Control

CESQG: Conditionally Exempt Small Quantity Generator

CFC: chlorofluorocarbon

CFR: Code of Federal Regulations

CGP: Construction General Permit

CO: carbon monoxide

CPSC: Consumer Products Safety Commission

CWA: Clean Water Act

EPA: Environmental Protection Agency

EPCRA: Environmental Planning and Community Right to Know Act

EPP: environmentally preferable purchasing

ETS: environmental tobacco smoke

FFDCA: Federal Food, Drug, and Cosmetic Act

FIFRA: Federal Insecticide, Fungicide, and Rodenticide Act

FQPA: Food Quality Protection Act

FR: Federal Register

HCFC: Hydrochlorofluorocarbon

HealthySEAT: Healthy School Environments Assessment Tool

HVAC: heating, ventilation and air conditioning

IAQ: indoor air quality

IAQ TFS: Indoor Air Quality Tools for Schools program

IPM: integrated pest management

LDR: Land Disposal Restrictions

LEA: local education agency

LBP: lead based paint

LQG: large quantity generator

MCL: maximum contaminant level

MSDS: Material Safety Data Sheet

MSW: Municipal Solid Waste

NESHAP: National Emissions Standards for Hazardous Air Pollutants

NEWMOA: Northeast Waste Management Officials' Association

NIOSH: National Institute for Occupational Safety and Health

NPDES: National Pollutant Discharge Elimination System

ODS: ozone depleting substances

OPPT: EPA's Office of Pollution Prevention and Toxics

OSHA: Occupational Safety and Health Administration

OSW: Office of Solid Waste

OUST: Office of Underground Storage Tanks

OWM: U.S. EPA's Office of Wastewater Management

OWOW: U.S. EPA's Office of Wetlands, Oceans, and Watersheds

P2: pollution prevention

PCB: polychlorinated biphenyls

pCi/L: picocurie per liter

ppm: parts per million

RCRA: Resource Conservation and Recovery Act

RH: Relative Humidity

SDWA: Safe Drinking Water Act

SPCC: spill prevention, control and countermeasures

SQG: small quantity generator

SWDA: Solid Waste Disposal Act

SWPPP: Storm Water Pollution Prevention Plan

TLV: threshold limit values

TSCA: Toxic Substances Control Act

UNC: universal naming convention

URL: uniform resource locator

UST: underground storage tank

UV: ultraviolet

VOC: volatile organic compound

9.3 Glossary

Active Facility Assessor:	An assessor that currently performs facility assessments for the school district.
Area/Topic:	Area/topic can refer to a location and/or the general environmental program category. It is the highest organizational level.
Assessment:	An evaluation of a school facility by referencing and completing a facility assessment checklist.
Assessment standard:	A specific and objective environmental, safety, or health condition the facility assessor will evaluate to ensure that a hazard or potential hazard does not exist.
Assessment Guidebook:	The comprehensive document explaining assessment standards, facility assessor guidance, EPA programs, and links to detailed guidance. Assessment standards are grouped under subtopics, which are grouped under areas/topics.
Assessment Type:	One of the following five choices which describes the nature and intent of the planned and/or conducted facility assessment: Routine; Incident Response; Complaint/Other; Re-Assessment; Construction/Renovation.
Custom Checklist:	Checklist used by districts – these may be customized to fit the individual district needs. Users may assign a name and choose specific assessment standards to be included in each custom checklist. These checklists may be used by assessors to guide their assessment activities, and to record the outcome of assessments, including specific recommendations.
Contact for Remediation:	Individual(s) responsible for remedying an issue and/or implementing a recommendation generated from a facility assessment.
Environmental Hazards:	Problems related to or caused by environmental factors, such as poor indoor air quality.
Facility Contact:	The person physically located at the facility who is the primary local contact regarding facility issues. In many cases this will be the same person designated as the "Primary Contact" for a facility.
Facility Type:	One of the following nine choices which most accurately describes the use of the facility: Multi-Use; Elementary School;

	Middle School; High School; Bus Depot; Administration; Industrial; Other; Career/Vocational.
Master Checklist:	A checklist that includes all assessment standards included in the district's Assessment Guidebook. This checklist may be used by assessors to guide their assessment activities, and to record the outcome of assessments, including specific recommendations.
Primary Contact:	The person primarily responsible for the facility (usually the principal), to whom issues and correspondence relating to HealthySEAT assessments should be directed. In many cases this will be the same person designated as the "Facility Contact" for a facility, although the "Primary Contact" does not have to be physically located at the school facility.
Priority:	The relative importance and/or timeliness for addressing an issue and/or implementing a recommendation generated from a facility assessment. Priority is reflected by a number from 1 to 4, with 1 being of higher importance or urgency than 4. Districts can configure the priority levels to suite their needs.
Retrofit:	Upgrading equipment to make it more environmentally friendly.
Self-Certification:	The ability for the school's primary contact to close out, through implementation, any HealthySEAT recommendations, and report (i.e., certify) the implementation to the district assessor.
Sort Order	This is a numeric value that controls the order in which information is displayed. Topics displayed in a checklist or guidebook are shown with the lowest numeric value first.
Subtopic:	A subtopic is an important organizational unit in the district's assessment guidebook. Assessment standards are grouped by subtopic, and subtopics are grouped under areas/topics.

9.4 Contacts

For technical questions related to the HealthySEAT software, please send an email to HSEAT_Support@cdm.com.

For other questions regarding HealthySEAT, please contact either:

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jones.bill@epa.gov