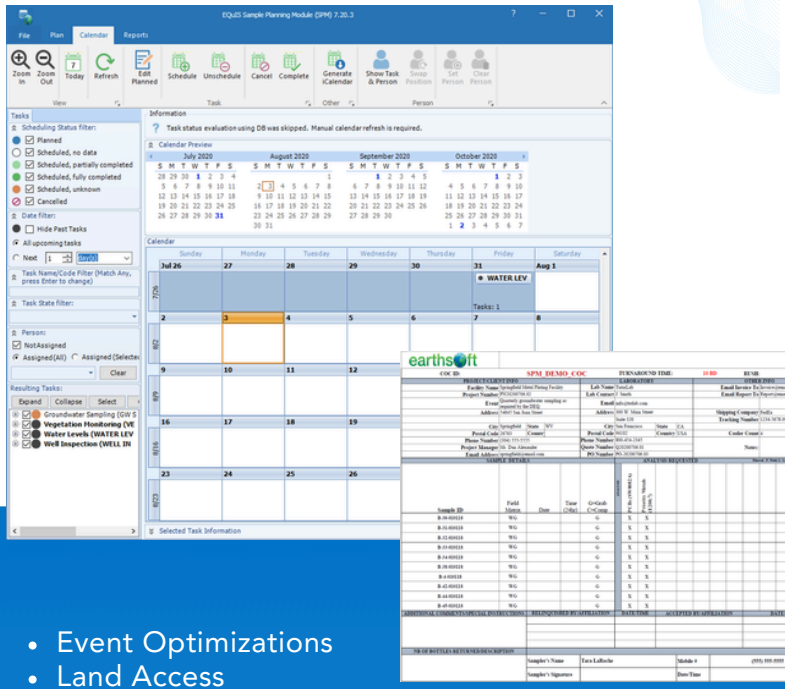
EQuIS® Sample Planning Module

Planning, Management and Tracking Software for Environmental Data Collection Activities

The Sample Planning Module (SPM) is part of the EQuIS environmental data management workflow and provides a planning tool for sampling events.

SPM improves data collection activities with planning, management, and tracking capabilities.

SPM can be used in conjunction with EQuIS Collect or EQuIS Data Gathering Engine (EDGE) to pre-populate data collection forms, increasing accuracy and efficiency while reducing data errors and saving time.



Track Tasks, Results, and Costs

SPM plans and schedules unique or repetitive sampling events and tasks, compares planned events on a calendar to actual activities, and tracks completeness. Tracking includes:

- Compliance
- Field Activities
- Laboratory Activities:
  - Sample Receipt Notifications (SRN)
  - Electronic Chain of Custody (eCoC)
  - Sampling Kit Request Forms
- Event Optimizations
- Land Access
- Filtered Views for Status, Personnel, and Equipment
- Resource Assignments for Personnel and Equipment
- Commitments (authorities, regulatory requirements)
- Completeness Tracking
- Cost and Invoice Tracking
- Key Performance Indicators (KPI)

Features

- Create detailed contracts for labs and field crews and manage associated costs
- Plan, schedule, and track recurring and individual sampling events
- Assign resources (people and equipment) to scheduled tasks
- View and download calendars for upcoming events
- View scheduled tasks across facility groups
- View, create, or edit land access and permit information
- Set automatic notifications via email
- Track testing related issues reported by labs with the Sample Receipt Notification (SRN) module
- Generate a variety of reports for status, completeness, lists, summaries, etc.

Produce Chain of Custody (COC) Forms and Bottle Labels

For each sampling event, pre-populate electronic CoCs and bottle labels with facilities, labs, billings, and reporting information for all planned samples. CoCs can be customized without any updates or changes to SPM.

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SPM Workflow

1 Define Plan(s)

One or more sampling plans can be defined for a specific site (i.e., facility)

2 Setup Contract(s)

Contracts are assigned to each SPM plan and include information about analytes, analytical methods, containers and costs

3 Plan Task(s)

SPM tasks describe details of field and sampling activities and can be planned as daily, weekly, monthly, quarterly, yearly...

4 Schedule Task(s)

Schedule (or unschedule) planned tasks as single actions or in batches as needed

5 Prepare for Field Sampling

Create Collect or EDGE template for field crews and generate COCs, task lists, bottle requests, and/or container labels

6 Manage SRNs

Manage Sample Receipt Notifications (SRNs) and testing-related issues reported by laboratories

7 Run Reports

Run Completeness Reports (after EDDs have been loaded into EQuIS) and manage laboratory invoices

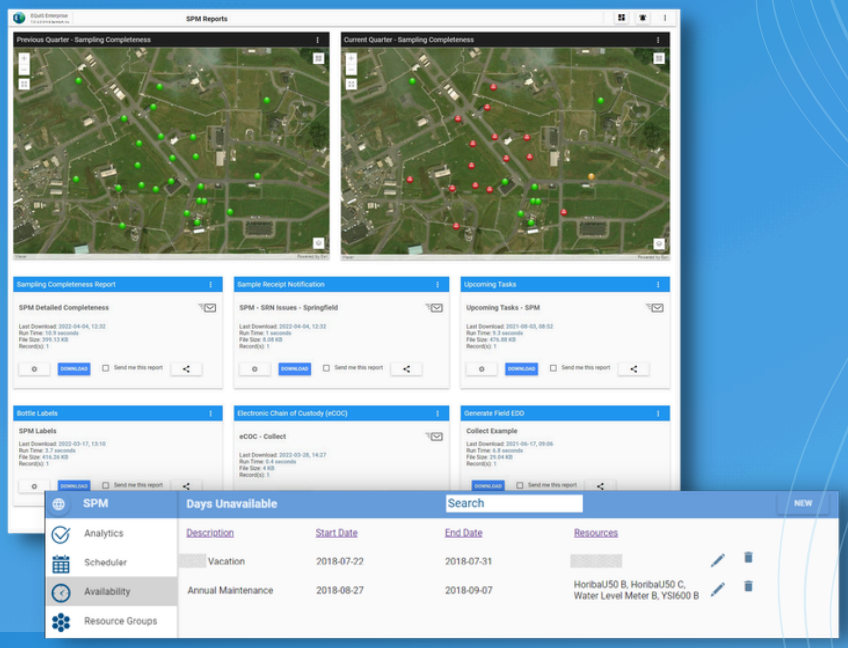
Benefits

- ✓ Component of EQuIS Schemas and workflows
- ✓ Make sample planning easier
- ✓ Eliminate repetitive, manual, error-prone data collection
- ✓ Pre-populate Collect or EDGE forms to virtually eliminate location and sample identification data entry errors
- ✓ Plan for availability conflicts of samplers and equipment
- ✓ Flag incomplete tasks
- ✓ Improve communication with laboratories
- ✓ Create Sample Analysis Plans that adhere to USEPA standards
- ✓ Track tasks, results, and costs

SPM is a key component of the EQuIS analytical data workflow and functions in tandem with EQuIS Collect, EDGE, the Data Qualification Module (DQM), and EQuIS Link.

SPM supports a comprehensive electronic workflow with analytical laboratories that includes eQuotes, eCOCs, and eSRNs.

SPM is available within EQuIS Professional PremierD and PremierDG Libraries.



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