# Sample Management

## Objectives

After completion of this module, the trainee will be able to

1. Describe the difference between directed samples and collector generated samples.
2. Schedule a directed sampling task.
3. State the purpose of the laboratory capacity reservation system.
4. Document a directed sampling task.
5. Cancel a scheduled sampling task from the Task Calendar.
6. Check laboratory results.
7. Print laboratory forms.
8. Describe the method of collecting a sample for establishments with no internet access.

## References

**FSIS Directive 13,000.2 Rev. 1** Performing Sampling Task in Official Establishments using the Public Health Information System 7-25-2014

**FSIS Directive 10,800.1** Procedures for Residue Sampling, Testing and other responsibilities for the National Residue Program 7/12/2007

**PHIS Users Guide** on InsideFSIS Intranet PHIS page

## Introduction

The Sample Management feature of PHIS streamlines scheduling, assigning, documentation, and tracking of FSIS's sampling tasks. IPP have the flexibility to schedule sample collection within the constraints of their particular assignment and the availability laboratory resources.

For instance, IPP at the establishment can either schedule the sample collection on the Task Calendar or cancel the sampling task when a sampling task is assigned to an establishment. When the sample collector places the lab sampling task on his/her task calendar, PHIS makes a laboratory reservation. The system generates a unique sample collection form number and bar code, which can be printed, and provides questions which the sample collector must answer as part of the sampling task.

## Sampling Verification Programs and Sampling Tasks

FSIS administers three sampling verification programs.

- Microbiological sampling for food borne pathogens such as for *E. coli* O157:H7 on raw beef products, *Salmonella* sampling for raw products, and *Listeria Monocytogenes* and *Salmonella* on ready-to-eat (RTE) products.

- Carcass/tissue (kidney, liver, heart, or spleen) sampling for drug and chemical residues (antibiotics, pesticides, and heavy metals) to ensure that residue tolerance or action level established by FDA and EPA are not violated.

- Carcass/tissue sampling for pathology determinations (e.g., disease conditions, wholesomeness, etc.) to determine if there is a risk to humans handling or consuming the meat or poultry products.

Lab sampling tasks fall into two collection types.

**Directed Sampling Tasks** displayed on the **Establishment Task List** are based on the sampling verification programs for which the establishment is eligible. Eligibility for a specific sampling program is determined by information entered in the establishment's profile in PHIS such as the slaughter class, type of product produced or processed, and production volumes. One or more directed lab sampling tasks may be created by an authorized user (typically at the Headquarters or District level) and directed to specified establishments.

Directed sampling notification is received through alerts on the inspector homepage. MT43 sampling of raw ground beef and HC_CH_CARC01- HACCP Verification Sampling for Young Chicken Carcasses are examples of directed sampling tasks. Residue testing in poultry carcasses, such as the NRP_YC-National Residue Program Sampling-Young Chickens, is also an example of directed sampling that will be displayed on the establishment task list.

Directed lab sampling tasks can also be created and distributed to an establishment based on a system-detected event such as a positive pathogen lab result. For example, MT44 sampling is a follow up sampling program in response to a MT43 positive *E. coli* O157:H7 test result.

**Note: Scheduling the task, reserving lab capacity, and documenting the collection of *all* directed sample requests is done through the Task Calendar and *not* the sample management left navigation menu in PHIS. Collector Generated Samples** are **not** displayed on the Establishment Task List. For example, IPP assigned to livestock slaughter establishments may perform in-plant residue screening tests, such as the Kidney Inhibition Swab (KIS™) on suspect animals. In response to positive or indeterminate FSIS in-

plant residue screening tests, the IPP may collect and submit confirmation samples to the lab for residue analysis.

In situations where IPP need to collect other types of samples (e.g., species substitution or a food borne illness outbreak) they are to contact their Frontline Supervisor (FLS) through their supervisory chain of command and request sample collection. IPP are to provide information to the FLS on the type of sample to be collected and a justification for the sample collection request. Upon approval of the sample collection, the IPP will add the sampling task to their Task Calendar and complete the sampling task.

**Note: For *all* collector generated samples, the IPP will need to create a sampling task in PHIS by determining laboratory capacity, scheduling the collection date, and documenting the collection of the sample. The mechanism for scheduling a sampling task and documenting collector generated samples varies in PHIS.**

- The entry of in-plant **livestock residue** screening results (both negative and positive) and the scheduling and submission of confirmation samples in response to positive or indeterminate in-plant screening test results is done through the **Animal Disposition Reporting (ADR)** left navigation menu tab.
- The scheduling and submission of **livestock pathology** samples is done through the **ADR** left navigation menu tab.
- The scheduling and submission of **poultry pathology** samples is done through the **Sample Management** left navigation menu tab.
- The scheduling and submission of any **other approved collector generated** sample is done through the **Sample Management** left navigation menu tab.

## PHIS Laboratory Capacity Reservation System

PHIS allows IPP to schedule sample collection tasks using the **PHIS Laboratory Capacity Reservation System**. The laboratory reservation system alerts the laboratory to expect the sample and ensures that FSIS laboratory resources will be available on the day the sample arrives. The requested collection date will be checked against the laboratory capacity and reservation module of PHIS. Confirmation will be provided indicating that there is available laboratory capacity on the requested collection date for the type of sample being collected. If capacity is not available, IPP are to select an alternate date. Once sample scheduling is completed, PHIS will display the address of the FSIS Laboratory that is scheduled to receive and analyze the sample.

IPP will document information about the collected sample and submit the sample form electronically through PHIS, ensuring that sample information is in the laboratory data systems when the lab analysis is complete. Sample results are reported to IPP through PHIS and are accessed through the IPP's Homepage.

These features as a whole will enhance the efficiency of all sampling resources, including IPP time in collecting samples, lab workload to analyze samples, and the effort needed to process and report results.

Remember

- Sampling tasks should be scheduled to the task calendar using a realistic collection date based on the plant's production schedule. This should be done as early as possible to ensure a capacity slot is available for the desired collection date. Once the sampling task has been moved from the task list to the calendar, a capacity slot is reserved to accommodate the scheduled sample. (See FSIS Directive 13,000.2 Rev. 1)

- Scheduled sampling tasks should be canceled or rescheduled as soon as IPP are aware they will not collect on a scheduled date so capacity slots can be released for others to use.

- Waiting to schedule sampling tasks in the last few days of the collection window may result in no capacity being available.

- Sampling for low and infrequent producers should be scheduled as far in advance as possible; IPP who encounter a 'no capacity available' issue should contact any laboratory to request a capacity slot be created. This may not be possible if the sampling is to occur late in the week and/or late in the sample collection window.

## General Instructions for Performing Sampling Tasks in PHIS

The FSIS laboratory is completely dependent on IPP to properly collect, prepare, and ship the sample. The FSIS Sampling Form that accompanies each sample must be completely and accurately filled out. The IPP role in the sampling process is vital. The information entered on the form becomes part of a legal document. If mistakes are made during the collection of the sample or on the form, the lab will discard the sample.

IPP are to review all relevant directives and notices associated with each verification sampling program and follow the instructions in those documents before collecting a sample. Links to FSIS Directives and Notices are available through the PHIS Homepage, under the "My Dashboard" tab in the "Smart Links" menu box.

IPP are to refer to the PHIS User Guide and applicable Directives and Notices for detailed instructions on documenting FSIS sampling tasks using PHIS, including scheduling the sampling task, entering sample data, and printing sampling forms.

IPP must print a laboratory sample form upon completion of the sample collection task, sign the form, and place it in the sample box with the collected sample.

IPP are to refer to FSIS Directive 7355.1, Use of Sample Seals for Laboratory Samples and Other Applications, for instructions on packaging and sealing sample boxes to ensure the integrity of samples submitted to laboratories for analysis.

First shift samples should be shipped the same day they are collected or they will be discarded by the laboratory. First shift samples may be collected Monday through Friday. Samples collected on the second shift and shipped the next day will not be discarded. Second shift samples may be collected Monday through Friday.

Samples are mailed so they arrive at the FSIS lab the next day. Samples should not be held over the weekend if it is avoidable (not more than three days). If you hold the sample over the weekend, the sample must be frozen. (Friday to Monday) The current contract carrier will ***deliver*** on Saturdays, but not ***pick-up*** on a Saturday. With the newer expanded billable stamps, there is no need to designate Saturday delivery.

**Note:** There is no requirement that residue samples be frozen if shipped the same day. They should be frozen if held overnight and then shipped as soon as possible.

## Ordering Sample Supplies

IPP should determine if adequate sampling supplies are on hand before collecting a sample. To ensure that the sample supplies are delivered to the correct location and in a timely manner, a physical address (no P.O. Box address) must be added as a “Laboratory Sample Supplies Address” in PHIS. The Laboratory Sample Supplies Address field is under the “General” tab in the Establishment Profile page. The address must be a valid physical location and zip code to ensure delivery by FedEx.

To order supplies, after adding the sampling task to the calendar, right click on the sampling task. From the drop down list, select **Lab Sample Order supplies**. A pop-up window appears with two read only fields (project code and FSIS laboratory filling request) and one **Comments** field. IPP are to enter text in the **Comments** field for the request and click **Submit Request**. A confirmation message appears. IPP are to close the pop-up.

IPP may also submit requests for sampling supplies through Outlook:

FSIS - Sampling Supplies - Western Lab-

FSIS - Sampling Supplies - Midwestern Lab

FSIS - Sampling Supplies - Eastern Lab

In the Outlook message, provide the establishment name and number, IPP daytime phone number, project code for the scheduled sample, the scheduled date for sample collection, and the supplies needed.

**Note:** Requests for histopathology sample supplies must be sent to the Eastern Lab and KIS supply requests need to be sent to the Midwestern Lab. However, if the KIS requests are made through the sample task option, PHIS will send the request to the appropriate lab based on the project code.

## Scheduling and Submitting a Directed Lab Sample

IPP must use the Establishment Task List and Task Calendar when scheduling or collecting **a directed sample**. For each lab sampling project, IPP will add the sampling tasks on their Task Calendar.

When scheduling a sampling task, IPP are to:

- Refer to the collection date range (sampling window) indicated in PHIS for the requested sample. Schedule the sampling task as soon as possible to ensure lab capacity. Also, if the sample can not be collected on that date, reschedule the sample so the lab can accommodate other samples.

- Use their knowledge of the establishment's production schedules to schedule and the collect the requested sample when the product is being produced.

- Ensure the establishment is given the opportunity to hold all product represented by the sample.

- Consider the priority of sampling tasks relative to the tasks already on their calendars and ensure that the most important tasks are completed by the end of the month.

- Ensure that sampling tasks are scheduled so that they can be completed within the time allowed for sample collection, as shown in PHIS.

To schedule a directed sampling task, IPP are to access the Establishment Task List, select the sampling task, and click the "Add" link adjacent to the Task Name to access the Assign Task pop-up window. In the pop-up window, IPP are to enter a sample collection date. The parcel pickup date (the date of sample pickup by the carrier) is generated when the sample collection date is entered and will default to the sample collection date. IPP change the parcel pickup date, if necessary, based on the availability of the carrier for sample pickup. IPP are to verify that there is laboratory capacity available for receipt of the sample for the parcel pickup date indicated. IPP click the "Save" button to schedule the sample and close the pop-up window. The sampling task will appear on the Task Calendar on the date scheduled.

To complete a sampling task, IPP are to refer to the PHIS User or Quick Reference Guide for detailed instructions on entering sample collection data. To assist them in their sampling task, IPP may choose to print a draft copy of the sampling form from PHIS for use as a reference during sample collection and to document product information to be recorded in PHIS. IPP are to enter the data requested in the data fields provided.

IPP will click on the **Additional information tab** and click on the **Take Questionnaire** link. IPP are to answer all the questions. If in doubt, IPP are to check the **Mark for Review** box in the upper right hand corner. IPP may research and answer the questions later. After IPP complete the questions, they are to click on **Next.** If IPP checked the **Mark for Review** box, these questions remain in a review status and IPP click on the **Save and Close**. If IPP choose **Save and Close**, the in progress Questionnaires are displayed from the **My Questionnaires** menu option. IPP may return to Lab Sampling with the **Lab Sampling** menu option or open the original requested questionnaire with **Requested Questionnaire** menu option. If IPP select **Next**, the Questionnaire is finalized and ready to be submitted. If IPP need to review a question again, they click **Back.** If not, IPP click **Submit.** If IPP click **Close**, the questionnaire is not submitted and IPP can review it later.

When sample collection data entry is completed, IPP are to click the “Submit to Lab” button, print a finalized form, apply the sample seal label (barcode identifier) to form, sign the form, and place it in the sample box. PHIS will display a message stating that the sample collection information has been successfully submitted.

1. Go to **Task Calendar** navigation menu

    a. Go to Establishment Task List

    b. Filter tasks by: Select **Lab Sampling** on the dropdown menu

    c. Select the **establishment** from the Select Establishment task list window

    d. Click **Add** to schedule a sample to your task calendar

    e. Right click on the task added to your task calendar and select **Document**

    f. The **Collection and Parcel Pickup** dates will default to the date of the task. IPP change the Parcel Pickup date, if needed. Make certain the window shows available lab capacity.

    g. After scheduling the sample, collect the sample.

h. After collecting the sample, right click on the task on the calendar and select **Document.** The Sample Collection window will open.

i. Enter initial sample information and any additional information that is requested for completion.

j. Click **Save and Continue**.

k. After completion of sample information, if prompted, click **Additional Info** tab to complete a questionnaire.

l. After completing each question, scroll to the bottom and click **Save** before advancing to the next question.

m. After completion of all questions, click **Submit to Lab** button to transmit the information. The application will return a message stating the sample collection has been successfully submitted.

n. Click **Print Form** at the top right of the page. Affix the sample ID seal in the designated space at the top center of the form.

o. **Sign and date** the printed form. Place the signed and dated form in the shipping container with the sample.

p. After the task has been scheduled and submitted, the task calendar will reflect the change under the “done” column on the task list.

**Note: Two common mistakes that result in FSIS laboratory employees discarding samples are failing to sign the paper copy of the sampling form and failing to submit the sample information electronically through PHIS in a timely manner. IPP are to pay particular attention to avoid these common mistakes.**

## Rescheduling/Cancelling a Directed Sampling Task

In situations where a **scheduled** sampling task cannot be completed on the scheduled date or within the designated time frame (e.g., product is not being produced during the directed sample task’s sampling window), the IPP must cancel and reschedule the sampling task if there is still time to collect the sample within the sampling window or completely cancel the sampling task from the task list. If IPP cannot collect the sample on the previously scheduled collection date, PHIS allows the collection date to be changed from the task on that date, once added to the task calendar. IPP are to right click on the task to be rescheduled and the dropdown box opens. IPP are to select **Cancel/Reschedule** from the four available options: Information, Document, Cancel/Reschedule, and Order/Supplies. IPP are to click **Reschedule** this task as soon as they are aware

that the sampling task needs to be rescheduled**,** and select a new Collection and Parcel Pickup Date and then click **Save.** The task shows up on the selected collection date on the Task Calendar.

To cancel a task that has been scheduled to the Task Calendar:

1. Open the Task Calendar
2. Filter by the Establishment
3. Right click on the **RTEPROD_RAND** sample task scheduled on the calendar
4. Select **Cancel/Reschedule** from the dropdown menu
5. Under select an option, select the radio button for **Cancel this task and return it to the Task List**
6. Click **Reason** down arrow
7. Select **Requested Sample unavailable during sampling timeframe** and then click **"Save"**

At this point, the scheduled Sampling task has been canceled from the Task Calendar, but not the Establishment Task List.

In order to delete all sampling tasks from the Establishment Task list, the IPP will

1. Click on the **Delete** button for the RTEPROD_RAND task

   The Cancel Lab Sampling Task pop-up window is displayed
2. Select the radio button for **Delete this task from the Task List**
3. Click the reason down arrow, and select **Requested sample unavailable during sampling timeframe**
4. Click the **Submit Task for Cancelling** button

   The samples are removed from the task list.

## Collecting Samples at establishments with no internet access

Method for IPP that collect samples at establishments that do not have internet access.

PHIS has the ability to perform certain functions when the PHIS system is not actively communicating with the data server due to a lack of internet connectivity. Since some IPP perform sample collection, in establishments where internet connectivity is not available this capability allows IPP to perform part of the sample collection function in PHIS.

When operating without internet access, PHIS cannot interact with the FSIS Laboratory Capacity Reservation System or transmit sample collection information to FSIS laboratories.

IPP are to schedule sampling tasks on their task calendar while connected to the internet.

Before leaving the establishment with internet connectivity to perform the sample collection at the establishment without internet connectivity; IPP are to open the scheduled sampling task in PHIS, enter whatever information is available at the time about the sampling task, and print two copies of the sample form.

IPP are to take both copies of the printed form with them to the establishment.

When they collect the appropriate sample(s) at the establishment, IPP are to document any remaining information by hand on both copies of the printed sample form.

IPP are to sign one copy of the sample form and place that copy in the sample box. IPP are to close and seal the sample box with the sample and signed sample form inside before leaving the establishment where they collected the sample.

IPP are to keep the second copy of the sample form with them as a record of the sample collection information to be recorded later in PHIS.

Within 24 hours, IPP are to return to an establishment in their assignment with internet connectivity, log into PHIS, select the sampling task from the task calendar and document the sample information using the information recorded by hand on the printed copy of the sample form. IPP are to submit the sample information to the laboratory by clicking “Submit” upon completion of data entry for all required data fields in the Sample Collection page. This will also mark the sampling task as completed on the task calendar.

When IPP do not submit the sample information electronically within 24 hours of sample shipment, there is a risk that the FSIS laboratory will obtain results of the analysis before the electronic sample record has been created. When this happens, the laboratory will not be able to report the sample results

electronically. In the rare event that FSIS laboratories are unable to report sample results electronically, they will report the results to the applicable district office by telephone or email. When this happens District Office personnel and the applicable Frontline Supervisor are to investigate why the electronic sample form was not submitted in a timely manner and initiate necessary action to prevent recurrence.

## Reporting Sample Results

Positive results are communicated via Alerts in PHIS on the Inspector's Homepage. Sample history is posted in PHIS in the Establishment Homepage in the Laboratory Sampling panel.

Positive and negative sample results are also tracked and posted in the Laboratory Information Management System, (LIMS)-Direct. IPP may access (LIMS)-Direct on FSIS computers, via FSIS Applications, Internet-Intranet, LIMS Direct. LIMS-Direct is a service that provides sample status and analysis result information for samples submitted to FSIS laboratories. Data is updated every 15 minutes.

Information reported in LIMS-Direct includes:

- Collection Date
- Sample Form number
- LIMS Number
- Whether product is held, as specified in the sample form
- Status of analysis
- Result
- Last Update

Establishments may get individual sample results via e-mail if their e-mail addresses are entered into PHIS. The IIC should still inform the establishment of the results he or she obtains from LIMS-Direct or PHIS. Additionally, FSIS posts quarterly summaries of aggregate establishment set results on its website as an indicator of nationwide trends.

## Hands- on Activity

Open laptop
Log-onto PHIS:
User Name: **FSIS_user**
Password: **FSIS**
Start Internet Explorer PHIS Log-in
Select User: **Robert Barclay (your #)**

## Exercise #1 Holland Point - Cancel an RTEPROD_RAND Sampling Task

1. Click the **Task Calendar** option on the navigation menu

2. In the inspector filter for the Task Calendar select **Robert Barclay**

3. In the establishment filter for the Task Calendar select **Holland Point Foods**
4. Scroll down and locate the **RTEPROD_RAND Sampling Task** scheduled for 2/9/2012 on the calendar

5. Right-click on the task and select **Cancel/Reschedule**

6. Under “Select an option” select the radio button for **Cancel this task and return it to the Task List**

7. Click the **Reason** down arrow and select **Requested sample unavailable during sampling timeframe** (may already be selected)

8. Click **Save** button

The sampling task is removed from the Task Calendar and returns to the Task List.

## Exercise #1 Holland Point - Cancel all RTEPROD_RAND Sampling Tasks for the Timeframe

Cancel the **RTEPROD_RAND** sampling task from the Task List

9. In the establishment filter for the Task List select **Holland Point Foods**

10. Filter by **Lab Sampling**

11. Click on the **Delete** button for the RTEPROD_RAND task dated **2/1/2016** to **2/29/2016**

    The Cancel Lab Sampling Task pop-up window is displayed

12. Select the **Delete this task from the Task List** radio button

13. Click the Reason down arrow and select **Requested sample unavailable during sampling timeframe**

14. Click the **Submit Task for Cancelling** button

The RTEPROD_RAND sample is removed from the task list.

## Exercise #1 Holland Point - Schedule a RTEPROD_RISK Sampling Task

15. Click the **Add** link for the RTEPROD_RISK sampling task with:
    - Start date: **2/01/2016**
    - End date: **2/29/2016**
16. In Schedule Sample pop up window, update Collection and Parcel Pickup dates to **Today**

17. Verify Lab capacity

18. Click the **Save** button to schedule sample and close window

19. Scroll down to the Task Calendar to observe that the **RTEPROD_RISK** task is scheduled

## Exercise #1 Holland Point - Documenting a RTEPROD_RISK Sampling Task

Robert Barclay collects a sample of sliced chicken breast and gathers the required information for the lab sampling form.

20. Right-click on the **RTEPROD_RISK** task and select **Order Supplies**

    This demonstrates where to click “Submit Request” to submit a sample supply request to the lab.

21. Click **Cancel**

22. Right-click on the task and select **Document**

23. Select Sample: Select **Product-RTE**

24. Select Category C: Pick **Product-RTE-Other Fully Cooked, Sliced**

25. Select Category D: Pick **Product-RTE-Other Fully Cooked, Sliced-Chicken**

26. Click **Save**

27. Phone # = **701-875-8989**

28. Production Date = **Today**

29. Product Name = **Sliced Chicken Breast**

30. Product Held = **Yes**

31. Lot # = **L1234**

32. Click **Save and Continue**

**Answer the Questions for RTEPROD_RISK Samples**

33. Click **Take Questionnaire** link and a pop-up window appears asking “Do you want to save your changes before going to the Questionnaire module?”

34. Click **OK**

35. Click **Start** when the “Welcome to the FSIS Questionnaire!” window appears

36. Product type = **Deli/sliced**

37. Line ID = **L1**

38. Time of collection = **1432**

39. Click **Next>>**

40. Lm Alternative = **Alt 1**

41. Establishment Contact Name **= Mike Adams**

42. Contact Phone = **701- 875-8989**

43. Click **Next>>**

44. Plant management notified = **Yes**

45. Dry Sausage = **No**

46. Short weighted = **No**

47. Click **Next>>**

48. Final Retail package = **Yes**

49. Click **Save and Close**

50. Click **Lab Sampling** on the left navigation menu to return to the Sample Management-Sample Collection page

51. Click the **Sample Collection Data tab**

**Print the lab sample form**

52. Click the **Print Form** link
    - Verify the accuracy of the sample form information
    - You can correct any issues found
53. Click the **small X** to close the sample form
54. Click the **Additional Info** tab
55. Click the **Take Questionnaire link**
    - This demonstrates how to navigate back to the text fields that may need to be corrected.
56. Click **OK**
57. Click **Resume** to return to the final page of the Questionnaire
58. Click **Next>>** if the answers are accurate
59. Click **Submit** to submit the Questionnaire
60. Click **Lab Sampling** on the left navigation menu to return to the Sample Management-Sample Collection page
61. Click **Submit to Lab**
62. Click **Print Form**
63. Click **Printer icon** to print a hardcopy
64. Click the **small X** to close the Lab Sample form
65. Click the **Close** button to close the **Sample Management- Sample Collection** page
    - Sign and date the sample form
    - Seal, package and ship sample according to FSIS Directive 7355.1
66. Click the **Sign out** button (top right)

## Exercise #2 Groveton - Reschedule a MT43 Sampling Task

### Log back into PHIS as Robert Barclay

1. Click on Task Calendar from Navigation Menu
2. In the inspector filter for the Task Calendar select **Robert Barclay**
3. In the establishment filter for the Task Calendar select **Groveton Meats**
4. Scroll down and locate the **MT43 Sampling Task** scheduled for 2/25/2016 on the calendar

   Reschedule the MT43 sampling task for **today**
5. Right Click on the MT43 sampling task and select **Cancel/Reschedule**
6. Select **Reschedule this task** radio button
7. Set collection date to **Today**
8. Set Parcel pickup for **Tomorrow**
   - The arrival date changes
9. Verify that lab capacity is available
10. Click the **Save** button to return to the Task Calendar

## Exercise #2 Groveton- Documenting a MT43 Sampling Task

### Enter the following information

11. Right click on the MT43 task you rescheduled and select **Document**
12. Select **Product-Raw-Ground, Comminuted or Otherwise Nonintact-Beef** as the sample
13. Click the **E.coli O157:H7 and Salmonella** box
14. Click the **E.coli O157:H7** box to deselect it
15. Click the **Save**
16. Enter Phone number **= 707-812-7285**
17. Enter Production Date **= Today**
18. Enter Product Name **= Ground Beef Patties**

19. Product Held **= Yes**
20. Lot number **= 9225B**
21. Remarks, Type **= Aseptically Taken Bulk Sample**
22. Click **Save and Continue button**

**Answer the Questions for MT43 Samples**

23. Click **Take Questionnaire** link and a pop-up window appears asking "Do you want to save your changes before going to the Questionnaire module?"
24. Click **OK**
25. Click **Start** when the "Welcome to the FSIS Questionnaire!" window appears
26. Time of Sample Collection = **1015**
27. Plant Management Notified = **Yes**
28. Check One = **Aseptically collected** (whirlpak bag)
29. Click **Next>>**
30. Sample = **Beef**
31. Pounds Represented, Type = **925**
32. Average Daily Volume = **Less than 1000 lbs**
33. Click **Next>>**
34. Establishment Contact Name = **Jeff Irvine**
35. Establishment Contact Phone = (**707) 812-7285**
36. Click **Next>>** which takes you to the Submit Questionnaire page
37. Click **Close**
38. Click **Lab Sampling** on the Navigation menu
39. Click the **Sample Collection Data** tab
40. Click the **Print Form** link to verify data entry
41. An is Error is noted- **product represented by this sample is 965 pounds**

42. Click the **small X** to close the pop-up window that shows the form

43. Click the **Additional Info** tab

44. Click the **Take Questionnaire** link

45. Click **OK**

46. Click **Resume** to return to the Questionnaire

47. Click **<<Previous** to return to Page 2 of the Questionnaire

## Correct Error

48. Change pounds of product represented from 925 to **965**

49. Click **Next>>**

50. Click **Next>>** again

51. Click the **Submit** button

52. Click **Lab Sampling** on the left navigation menu

## Exercise #2- Groveton- Completing the MT43 Sampling Task

53. Click **Submit to Lab** button

54. Print a hardcopy by clicking the **Print Form** link, then right click on the form and select **Print** in the menu

    - Sign and date the sample form
    - Seal, package and ship sample according to FSIS Directive 7355.1

## Exercise #2 Groveton - Saving the Sampling Form to Your Computer

55. To save a copy of sample form as a PDF file

    - Left click on the sprocket (tools) icon in the left corner of the window
    - Click on **File** in the menu
    - Select **"Save as"** in the menu
    - Select **Desktop** (may already be selected)

- Type File name = **Groveton MT43 + Today's Date**
- Click the **Save** button

  **Note:** IPP can also save a copy of the form by clicking the Save icon at the bottom of the computer screen, naming the file, and then clicking the Save button.

56. Click the **small X** to close the pop up window that shows the form
57. Click the **Close** to close the **Sample Management**-**Lab Sample Collection** page
58. Scroll down and locate the completed (green) **MT43 Sampling Task** scheduled for **Today** on the task calendar
59. Click the **Sign Out** button

## Exercise #3 - Novosibar- Schedule a Directed Poultry Residue Sampling Task

- Log back into PHIS as **Cindy Soundly**

1. Click on **Task Calendar** from Navigation Menu
2. In the establishment filter for the Establishment Task List select **Novosibar**
3. Filter by **Lab Sampling**
4. Click the **Add** link for the NRP-YC-National Residue Program Sampling-Young Chickens sample with:
   - Start date: **1/30/2016**
   - End date: **3/8/2016**
5. In the Schedule Sample pop up window, update Collection and Parcel Pickup dates for **tomorrow**
6. Verify Lab capacity is available
7. Click **Save** to schedule sample and close the window
8. In the establishment filter for the Task Calendar select **Novosibar**
9. Scroll down and locate the **NRP_YC Residue Sampling Task** scheduled for **tomorrow** on the calendar

## Exercise # 3- Novosibar- Create a Poultry Pathology Sampling Task

10. Click the **Home Breadcrumb**
11. Click the down arrow next to **Sample Management** on the Navigation Menu
12. Click on **Create Sampling Task**
    - The **Generate a Sample window** opens

## Enter the pathology sample collection details

13. Establishment = **Novosibar**
14. Project code = **PATH_Poultry**
15. Check the **Pathology Panel-Animal** box
16. Sample = **Animal-Chicken**
17. Category C = **Animal-Chicken-Young Chicken**
18. Click the **Save** button
19. Click **Schedule Sample** link
    - The scheduling window opens
20. In Schedule Sample pop up window, update Collection and Parcel Pickup dates for **Today**
21. Verify Lab capacity is available
22. Click the **Save** button to schedule sample and close the window

## Exercise #3 - Novosibar- Documenting a Poultry Pathology Sampling Task

### Enter the following information

23. Phone number = **123-456-7890**
24. Slaughter Date = **Today's**
25. Click the **Condemned (by USDA)** radio button
26. Flock Owner = **Cole Thorton Farms**

27. Address = **P.O box 1088**

28. City, State and Zip = **Merced, CA, 00000**

29. Click the **Save and Continue** button

30. Click the **Take Questionnaire** link

31. Click **OK**

32. Click the **Start** button

**Answer Questions for pathology samples**

33. Gender = **Unknown**

34. Age of Animal = **4**

35. Age of Animal = **Months**

36. Click **Next>>**

37. Tissue Submitted = **Kidney, Liver and Spleen**

38. Other tissues submitted = **None**

39. Frozen tissues submitted = **None**

40. Click **Next>>**

41. Additional Comments = **None**

42. Click **Save & Close**

43. Click **Lab Sampling** on the left navigation menu to return to the Sample Management-Sample Collection page

44. Click the **Sample Collection Data** tab

## Exercise #3- Novosibar- Completing a Poultry Pathology Sampling Task

- Print the lab sample form

45. Click the **Print Form** link

    - Verify the accuracy of the sample form information
    - You can correct any issues found

46. Click the small **X** to close the sample form

47. Click the **Additional Info** tab

48. Click the **Take Questionnaire** link

49. Click **OK**

50. Click **Resume**

51. Click **Next>>**

52. Click **Submit** to submit the Questionnaire

53. Click **Lab Sampling** on the left navigation menu

54. Click **Submit to Lab** to submit the sample form to the laboratory

    - Note the “Sample Collection has been submitted to the lab” message

55. Print a hardcopy by clicking the **Print Form** link again, right clicking anywhere on the form, then selecting **Print** in the menu, or by clicking on the **Printer icon** at the bottom of the computer screen

    - Sign and date the sample form
    - Seal, package and ship pathology sample according to FSIS Directive 7355.1

56. Click the **Sign out** button

## Exercise #4 - View Sample History and View Alerts for Sample Results

1. Log into PHIS as **Robert Barclay**
2. Click on the down arrow next to **Establishment Profile** on the navigation menu
3. Click **Select Establishment**
4. Click the **My Establishments** tab
5. Click on the **House Icon** for Groveton
6. Click the arrow in the **Basic Panel** to collapse it
7. Click the **Laboratory Sampling** panel

8. Scroll down and View **Sample Projects and Sample History**
9. Click **Home Breadcrumb**
10. Find the notification **Presumptive positive E. coli O157:H7**
11. Click on the notification
12. Click the **Mark As Read** button
13. Click the **Black X** to close the alert window
14. Click the **Sign out** button