

ArcGIS Survey123 Chain of Custody and Trip Plan Summary
Standard Operating Procedure
IC eDNA Monitoring Program



U.S. Fish and Wildlife Service, Region 3

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Document Information

IC eDNA Monitoring Program

ArcGIS Survey123 Chain of Custody and Trip Plan Summary

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Application/Purpose

Procedure for using Survey123 digital Chain of Custody (COC) and Trip Plan Summary Form for Invasive Carp eDNA Monitoring Program.

Roles and Responsibilities

All eDNA Monitoring Program staff sending or receiving Survey123 COC and Trip Plan Summary Forms should read and understand this SOP.

Survey 123 COC Creation Procedure

To create and send COC's in Survey123: (instructions work for I-Phone and I-Pad)

1. Make sure you have the latest Survey123 version by downloading the installation files from Esri (don't need IT approval)
2. Download Survey123 Form from ArcGIS Survey123 Application.
3. On the login page select Enterprise Login.
4. Type FWS into text box.
5. Select U.S. Fish and Wildlife Service
6. Sign in using credentials if needed
7. Select "Download Surveys" from the menu or "Get Surveys" if no surveys are on device

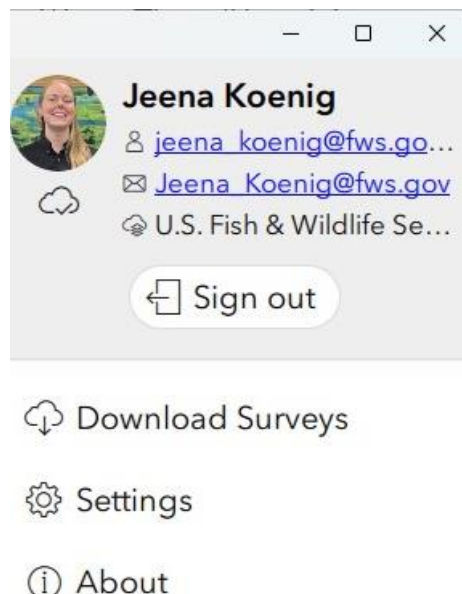


Figure 1. Survey123 Main Menu Options

8. There will be one COC form to input transfers and shipping of samples. The form is called "FWS Invasive Carp eDNA Chain of Custody." The thumbnail image is of a Silver Carp above a DNA strand and the text Invasive Carp eDNA.

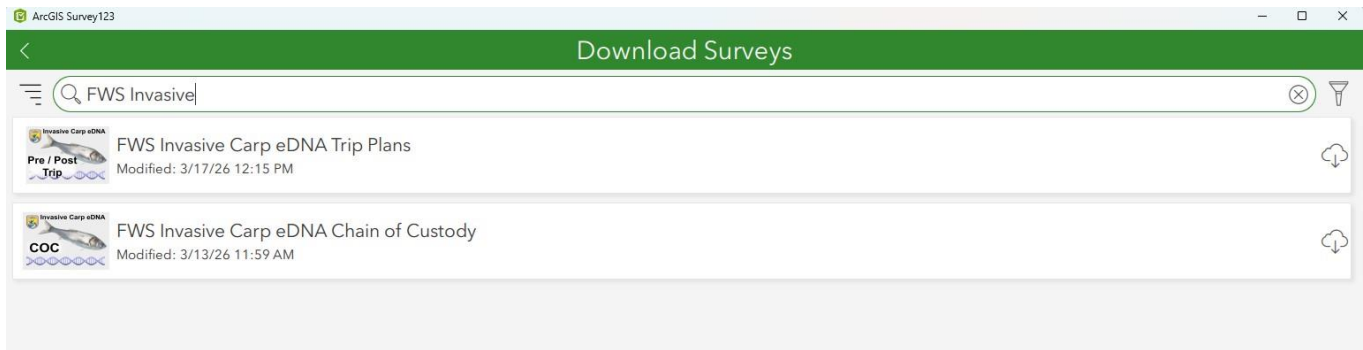


Figure 2. List of available Survey123 forms for download filtered by FWS Invasive

9. Once you have the appropriate form downloaded, go to the upper left-hand corner of the screen and select the back arrow. You should see the form you downloaded under My Survey123 window.
10. To create a new COC form when collecting eDNA samples, open the Survey123 app on your I-Pad at the beginning of your week and click on the COC form and select "Collect."
11. Enter the information required in the various boxes i.e. project, case number, number of samples, date of collection, enter the crew names in the collected by box, select your office (should be a drop down menu with all the FWCO's) and fill in any notes that pertain to the collection of your samples.
12. Once the collection team (boat, or otherwise) is ready to hand off to trailer personnel, Use the Transfer Log group to enter in sample numbers, select a delivery method (FedEx, in person, or other), one of the collection team members should type their name in the release signature box and select the check box certifying their digital signature, enter in Release agency (default set to USFWS), and select the release date.
13. The person receiving the samples, either a person working in the processing trailer or a "runner" that will transfer the samples from the boat personnel to processing trailer personnel, will then type their name in the receipt signature box and select the check box certifying their digital signature, enter in Receipt agency (default set to USFWS), select the receipt date. The Person receiving the samples from the boat will then select the submit button in the bottom right corner of the form (looks like a "check mark") and select send now if there is a Cellular signal, otherwise select Send Later and use the Outbox to send your forms to ArcGIS Online when within Cellular range.
14. If a runner was used, using the Inbox of the FWS Invasive Carp eDNA COC 2026, find the corresponding case number and create a new repeat under the transfer log group. The runner should fill out the release information, and the trailer staff should now fill out the receipt information in the new repeat transfer log once the runner delivers the samples identified in the form.

Note: Always select the Refresh icon in the bottom right-hand corner of the Inbox to see the latest forms, Inbox does not show newly submitted forms automatically.

The screenshot shows a mobile application window titled "ArcGIS Survey123". The header bar is green and contains a back arrow, the text "FWS Invasive Carp eDNA Chain of Custody", a refresh icon, and a menu icon. Below the header, there is a card for the form. The card has a title "Invasive Carp eDNA" with a fish icon, a subtitle "COC" with a DNA helix icon, and metadata: "Owner: jason_ross@fws.gov_fws", "Created: 2/25/26 11:57 AM", and "Modified: 3/13/26 11:59 AM". Below the card, there is a description: "This form is intended to track the transfer of samples as part of the Invasive Carp eDNA chain of custody requirements." At the bottom, there are two buttons: "Collect" with a plus icon and "Inbox" with a download icon. The "Inbox" button is highlighted with a red rectangle.

Figure 3. Form information on FWS Invasive Carp eDNA Chain of Custody and form options

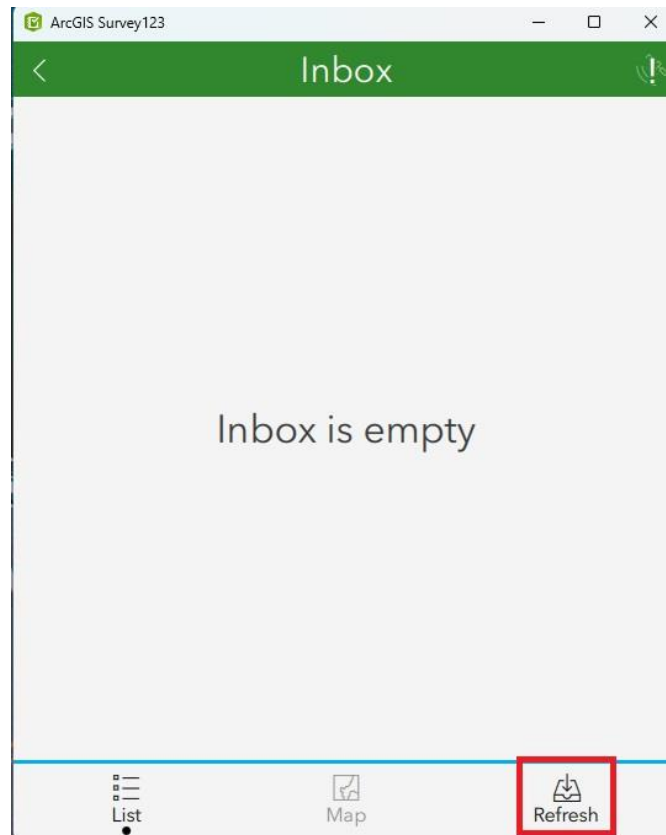


Figure 4. Inbox view of Survey123 app

15. The trailer crew can then submit the form and select send now if there is a WiFi or Cellular signal. From here, the boat crew can create a new form for a new case following steps 8-13. **Important:** Never leave Survey123 forms in your Outbox if cellular signal is available, make sure to send forms to ArcGIS Online as soon as possible. Go to Outbox, select the Send icon in the bottom right-hand corner to send forms to ArcGIS Online.
16. Once the samples have been processed in the trailer and packaged for shipment to WGL, the processing lead (or designee) will need to create a new repeat under the Transfer Log group for the corresponding case number in the inbox of the FWS Invasive Carp eDNA COC 2026 and enter all the pertinent information.
17. The shipping notes must be filled out to indicate how many containers and samples are included in the shipment. For example, if a case is being shipped that has 200 samples in 2 boxes, the shipping notes should read: "Shipping 2 boxes: Box 1:samples 1-100. Box 2: samples 101- 200." Then WGL staff will know to expect 2 boxes for case xyz with the matching samples and COC's in the Survey123 shipping COC form inbox. Survey 123 will not let a form be submitted unless all required fields are filled out (Notes will pop up for your guidance).

18. Submit the form by selecting the submit button in the bottom right corner of the form.

Survey 123 COC Submission Procedure

1. When the Survey123 COC form is submitted with the shipping information in the transfer log, an e-mail notification will automatically be sent to the WGL staff informing them of the shipment details entered into the form. The processing lead should use the R3 eDNA Program, eDNA shipping alerts Teams channel to input the tracking numbers for the case shipped.
2. When the case arrives at WGL, the person checking in the samples should open the COC form on Survey 123 using the inbox and select the case from the FWCO that shipped it. **Note:** Always select the Refresh icon in the bottom right-hand corner of the Inbox to see the latest forms, Inbox does not show newly submitted forms automatically.
3. From here WGL check-in staff need to make sure that the samples collected/shipped match the samples received from FedEx. Any discrepancies should be addressed with a follow up call or email to the person whose name appears in the Released box on the Shipping COC and/or the Station eDNA Lead to make corrections. Corrective actions should be recorded in the editing notes section of the Shipping COC form. The FWCO staff member making the corrections should initial and date all editing notes. Ex: "Added agency to release agency-JK 3/5/2026"
4. Once the accuracy is verified for the COC form shipping information then the WGL check-in staff can sign and date under the receipt signature and select the submit button (Select Send Now after submission) finalizing the case's documentation of receipt and by the WGL.
5. All COC forms will be QA/QC by the eDNA Processing QA/QC Specialist designee and backed up at the end of the season.

Survey123 COC Form Examples

Please use this form for all transfers of samples related to Invasive Carp eDNA

Case Information

Project *
eDNA Monitoring of Bighead and Silver Carps

Case Number *
25010

Number of Samples *
Total collected for the case (update if samples are lost)
100

Sample Type *
Centrifuge

Collection Office *
La Crosse FWCO

Collected By *
first and last names of all crew members
Jenna Bloomfield, Cody Henderson, Rebecca Neeley

Date of Collection *
Monday, March 16, 2026

Last Shipped Date
Monday, March 16, 2026

Notes
Example: Samples 010-038 were not collected JER (initial as well)

Figure 5. The case information form group in the FWS Invasive Carp eDNA COC 2026 Survey123 form

Transfer Log

Reminder: Add a record (repeat) for each sample transfer.

Minimum Sample Number *
1

Maximum Sample Number *
100

Release Signature

Release Signature *
first and last name
Jenna Bloomfield

I certify the digital receipt signature above represents my signature for Chain of Custody purposes. *
☒ Yes

Release Agency *
U.S. Fish and Wildlife Service

Release Date *
Monday, March 16, 2026

Delivered via *
☐ FedEx
☒ In Person
☐ Other

Shipping Notes
Example: Shipping 2 boxes: Box 1: 1-100, Box 2: 101-200 JER (initial as well)

Receipt Signature

1 of 2

Figure 6. The transfer log form group in the FWS Invasive Carp eDNA COC 2026 Survey123 form

FWS Invasive Carp eDNA COC 2026

Release Agency *
U.S. Fish and Wildlife Service

Release Date *
Monday, March 16, 2026

Delivered via *
☐ FedEx
☒ In Person
☐ Other

Shipping Notes
 Example: Shipping 2 boxes: Box 1: 1-100, Box 2: 101-200 JER (initial as well)

Receipt Signature

Receipt Signature
first and last name
Katie Lieder

I certify the digital receipt signature above represents my signature for Chain of Custody purposes.
☒ Yes

Receipt Agency
U.S. Fish and Wildlife Service

Receipt Date
Monday, March 16, 2026

1 of 2

Editing Notes
 Use this field when changing data and initial

Figure 7. The release information and receipt information filled out in the FWS Invasive Carp eDNA COC 2026 Survey123 form

Transfer Log

Reminder: Add a record (repeat) for each sample transfer.

Minimum Sample Number *
1

Maximum Sample Number *
100

Release Signature

Release Signature *
first and last name
Katie Lieder

I certify the digital receipt signature above represents my signature for Chain of Custody purposes. *
☒ Yes

Release Agency *
U.S. Fish and Wildlife Service

Release Date *
Tuesday, March 17, 2026

Delivered via *
☒ FedEx
☐ In Person
☐ Other

Shipping Notes
 Example: Shipping 2 boxes: Box 1: 1-100, Box 2: 101-200 JER (initial as well)
 Shipping 1 Box: 1-100

Receipt Signature

Figure 8. The release information filled out for shipping a case including shipping notes in the FWS Invasive Carp eDNA COC 2026 Survey123 form

Survey123 COC WGL Only

Release Agency *		Release Date *	
U.S. Fish and Wildlife Service		Tuesday, March 17, 2026	
Delivered via *			
☒ FedEx ☐ In Person ☐ Other			
Shipping Notes			
Example: Shipping 2 boxes: Box 1: 1-100, Box 2: 101-200 JER (initial as well)			
Shipping 1 Box: 1-100			
▼ Receipt Signature			
Receipt Signature		I certify the digital receipt signature above represents my signature for Chain of Custody purposes.	
first and last name		☒ Yes	
Joshua Stefanski			
Receipt Agency		Receipt Date	
U.S. Fish and Wildlife Service		Friday, March 20, 2026	
Editing Notes			
Use this field when changing data and initial			

Figure 9. The receipt information filled out by Whitney Genetics lab when receiving samples shipped in the FWS Invasive Carp COC 2026 Survey123 form

Survey 123 Instructions for Trip Summary Form

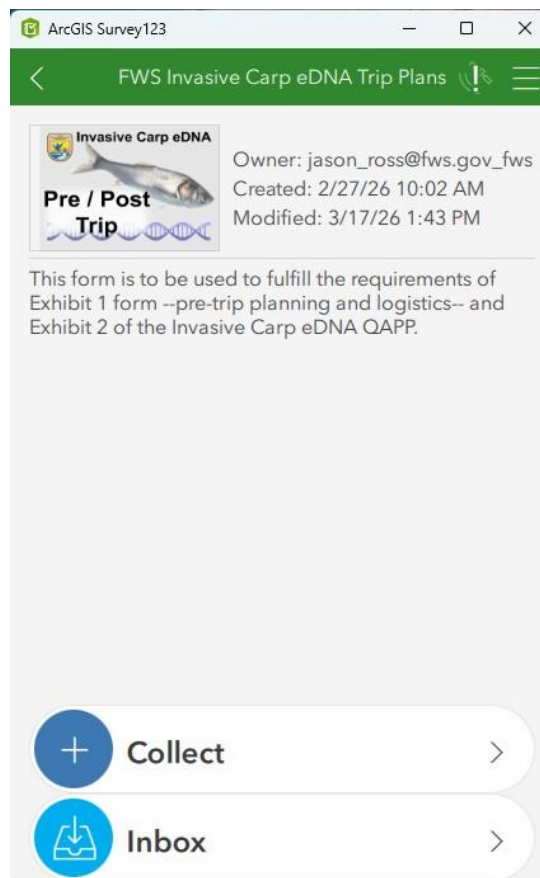
1. To create and send Trip Summary Plan in Survey123: (instructions work for I-Phone and I-Pad).
2. Download Survey123 Form from ArcGIS Survey123 Application.
3. On the login page select Enterprise Login.
4. Type FWS into text box.
5. Select U.S. Fish and Wildlife Service.
6. Sign in using FWS Account and Password if needed.
7. Select "Download Surveys" from the menu or "Get Surveys" if no surveys are on device.
8. Type: FWS Invasive Carp eDNA Trip Plans in the search bar and select the download icon on the right. A cloud icon with the downward arrow will appear if

the form has not been downloaded yet.

9. Once you have the appropriate form downloaded, go to the upper left-hand corner of the screen and select the back arrow. You should see the form you downloaded.

Pre-Trip Form Section

1. To create a new Trip Summary Plan before collecting eDNA samples, open the Survey123 app on your I-Pad, I-Phone or Computer at least 1 business day before sample collection and click on the FWS Invasive Carp eDNA Trip Plans and select "Collect".



The screenshot shows the ArcGIS Survey123 app interface. At the top is a green header bar with a back arrow on the left and the title 'FWS Invasive Carp eDNA Trip Plans' in the center. Below the header is a form card. The card has a title 'Invasive Carp eDNA' with a fish icon, a subtitle 'Pre / Post Trip' with a DNA helix icon, and a description: 'This form is to be used to fulfill the requirements of Exhibit 1 form --pre-trip planning and logistics-- and Exhibit 2 of the Invasive Carp eDNA QAPP.' To the right of the card, the owner is listed as 'jason_ross@fws.gov_fws', the creation date is '2/27/26 10:02 AM', and the modification date is '3/17/26 1:43 PM'. At the bottom of the screen is a navigation bar with two buttons: 'Collect' (with a plus icon) and 'Inbox' (with a download icon).

Figure 10. Form information on FWS Invasive Carp eDNA Trip Plans and form options

2. Enter the information for all Pre-Trip fields, making sure to enter in repeats under Daily Plans for multi-day trips for a case and then submit the form.

Note: For Location and Plan section of form, only enter in the start boat ramp coordinates if launching from multiple boat ramps in the same day and enter in the rest of the boat ramp coordinates in the plan description field.

ArcGIS Survey123

FWS Invasive Carp eDNA Trips Form

1. Pre-Trip Planning and Logistics

This section is intended to fulfill the requirements of Exhibit 1 form --pre-trip planning and logistics-- in section B1 of the Invasive Carp eDNA QAPP. This section must be completed at least one business day prior to the start of the event. Please click on the Pre-Trip Plans section to expand the group and fill in the appropriate information.

▼ **Pre-Trip Plans**

Case Number *	Field Operations Manager * Please enter in their first and last name.	Field Operations Manager Phone *

Figure 11. The Pre-Trip form information in the FWS Invasive Carp eDNA Trips Form

▼ **Daily Plans**

Date *

Number of Samples *

Number of Blanks *

Sampling Crew

Please enter in their first and last names.

Boat Operator *

Sample Collector *

Sample Assistant *

Figure 12. The Pre-Trip form information for the daily plans in the FWS Invasive Carp eDNA Trips Form

Location and Plan

Starting Boat Ramp Geopoint *

Boat Ramp Coordinates

Plan Description *

Please describe sampling plans, including coordinates for additional boat ramps.

LocationMaps

Please upload all maps required for case number and use jpg or pdf.

1 of 1

Figure 13. The Location and Plan group information in the FWS Invasive Carp eDNA Trips Form

Post Trip Form Section

1. To enter in Post Trip information after collecting eDNA samples, open the Survey123 app on your I-Pad, I-Phone or Computer within 10 business days after sample collection and use the Inbox of the FWS Invasive Carp eDNA Trips Form to find the Case
2. Refresh the Inbox if needed.
3. Select the Case Record from the Inbox List and select edit
4. Select Yes to the Have you completed the field sampling and prepared to submit the Post-Trip Summary under the 2. Post Trip Field Summary Section of the form
5. Expand the Post Trip Section to see the Post Trip fields to fill out
6. Information that should be included in the Post-Trip & QA/QC Summary Form Section would include any deviations made to the sampling plan. Those notes and/or deviations could include environmental conditions that would limit sampling or alternate site selection, potential areas for contamination (fish jumped in boat).

7. Once fields have been filled out and the eDNA Lead Signature information is entered, select the ✓ to submit the form. Disregard the Data Quality Review Section.
8. All questions are required, so if you accidentally miss a question, the form will automatically direct you to what you missed.
9. All Trip forms will be QA/QC by the eDNA Processing QA/QC Specialist designee and backed up at the end of the season.