



Instructions for Filing Out Lab Request Forms

Page 1 of 3

Document # LCS117 Prepared By: CR

Approved By: SS

Date: 10/15/24

PURPOSE: Instructions for filling out lab request forms when submitting samples to the Westfield Laboratory.

SCOPE: These instructions are for both the Chemistry and Microbiology Labs.

NOTES / REQUIRED DOCUMENTS:

1. Information on the Lab Analysis Request form & sample bottles should be legible.
2. Lab Analysis Request forms can also be filled out electronically & subsequently printed.
3. Lab Analysis Request Form are as follows:
 - a. Chemistry Lab Form CL101a
 - b. Microbiological Lab Form ML101a
4. A Lab Analysis Request form is required for all samples submitted to the lab for analysis.
5. Taping the lids to the sample bottles with a vinyl type tape (electrical tape) helps minimize leakage during shipping.

Chemistry Lab Analysis Request Form (CL101a)

PROCEDURE:

1. Fill out the top portion of the form as follows:
 - a. Customer Name as it appears in our ERP system (no abbreviations)
 - b. Ship to number associated with this specific customer.
 - i. If this is a prospect account, please leave this section blank.
 - c. Payment type
 - i. No charge/Contract
 - ii. Prospect Account
 - iii. Charge – PO is required prior to analysis being performed.
 1. A lab order submitted without a Customer PO MUST have Vice President or Regional Manager approval prior to analysis being performed.
 - d. Email Contact
 - i. The report will be emailed to the field representative & manager of the account.
 - e. Sampler Name (no initials)
 - f. Date Sampled & Time Zone
 - g. Analysis Lead Time
 - i. Standard lead time for water, deposit & glycol sample is 5 working days.
 - ii. Standard lead time for corrosion coupons is 10 working days.
 - iii. Expedited lead time for water, glycol & coupon sample is 1-2 working days.
 - iv. Expedited lead time for deposit sample is 3 working days.
 - v. 100% surcharge is applied for expedited requests.
2. Fill in sample information.
 - a. Sample name
 - i. This will be the sample name on the report, including abbreviations.
 - ii. This name needs to be the same as the one on the sample bottles.
 - iii. Examples: make up water, city water, boiler, feedwater, cooling tower, closed loop, B134 glycol loop & etc.
 - b. Date sampled



Instructions for Filing Out Lab Request Forms

Page 2 of 3

Document # LCS117 Prepared By: CR

Approved By: SS

Date: 10/15/24

- c. Matrix of sample
- d. Glycol Type
 - i. This is required when submitting a glycol sample.
- e. Field Results
 - i. These will be on the final report.
- f. Analysis Item Number Request (see page 2 of the lab request form).
 - i. Enter the item number(s) associated with the analysis you are requesting.
 - ii. See Chemistry Lab Analytical Packages & Price List (CL102) for sample size requirements.

Microbiological Lab Analysis Request Form

PROCEDURE:

1. Fill out the top portion of the form as follows:
 - a. Customer Name as it appears in our ERP system (no abbreviations)
 - b. Ship to number associated with this specific customer.
 - i. If this is a prospect account, please leave blank.
 - c. Payment type
 - i. No charge/Contract
 - ii. Prospect Account
 - iii. Charge – PO is required prior to analysis being performed.
 1. A lab order submitted without a Customer PO MUST have Vice President or Regional Manager approval prior to analysis being performed.
 - d. Email Contact
 - i. The report will be emailed to the field representative & manager of the account.
 - e. Sampler Name (no initials)
 - f. Date Sampled & Time Zone
 - g. Sample by Apex Tech.
 - i. Please indicate if Apex personnel took the sample.
 - ii. The number of sampling hours also includes your drive time.
 - iii. There is a \$135 per hour charge for on-site sampling by an Apex employee.
2. Fill in sample information.
 - a. ID #
 - i. This is used when taking multiple samples. Number the bottles with an ID number, customer name, sample name & time sample was taken.
 - b. Building/Area Name
 - i. Examples: Bldg. A, Cancer Center, ICU, Lobby & etc.
 - c. Floor Number
 - d. Room Number
 - e. Outlet Type
 - i. Examples: sink, shower, bath sink, drinking fountain, cooling tower, decorative fountain, ice machine, incoming main water, clinical sink, water heater & etc.
 - f. Source Water
 - i. Examples: cold, hot, mixed, sample port, basin, ice & etc.



Instructions for Filing Out Lab Request Forms

Page 3 of 3

Document # LCS117 Prepared By: CR

Approved By: SS

Date: 10/15/24

- g. Sample Type
 - i. Potable: drinking water, sink, shower, drinking fountain, ice machine, incoming water, water heater, swimming pool & etc.
 - ii. Non-Potable: non-drinking water, cooling tower, decorative fountain & etc.
 - iii. Swabs are typically used during cluster or outbreak investigations. These can be from potable or non-potable water sources.
- h. Time Sampled
 - i. Samples must be received by the lab within 48 hours of when the 1st sample was drawn if ice packs are NOT used. If ice packs are used & the sample is kept between 40-50 °F, the samples can be received by the lab within 72 hours of when the 1st sample was drawn.
- i. Field Results
 - i. If field results are taken, they will be in the *Legionella* report.
- j. Analysis Item Number Request (see page 2 of the lab request form).
 - i. Enter the item number(s) associated with the analysis you are requesting.
 - ii. If multiple analyses are needed from the same water source, please contact Lab Customer Service at LabCS@TeamApex.com for sample size requirements.