

## R9 Scribe Data Delivery Guidance & Audit Rules

March 2023

### Overview

This document provides guidance on delivery of data through Scribe to the U.S. Environmental Protection Agency (EPA) Region 9. To ensure data accuracy, consistency, and completeness, all parties (R9 staff, Potentially Responsible Parties (PRP), and contractors are encouraged to apply this guidance when delivering and publishing (Scribe.net) data for EPA Region 9. This document is to be used in conjunction with the ERT Comprehensive Training Manual for Scribe v3.10 found on the [ERT Scribe Support and Development Website](#).

### Contacts

*Table 1. Contacts for this guidance document*

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## Using the R9 Scribe Guidance

First, follow the instructions listed in the [Environmental Response Team \(ERT\) Comprehensive Training Guide](#) if you are **Creating a New Scribe Project (page 4)**.

*Figure 1. Training Exercises - Exercise One about Scribe Basics*



US EPA Environmental Response Team  
Comprehensive Training Manual for Scribe v3.10

## TRAINING EXERCISES

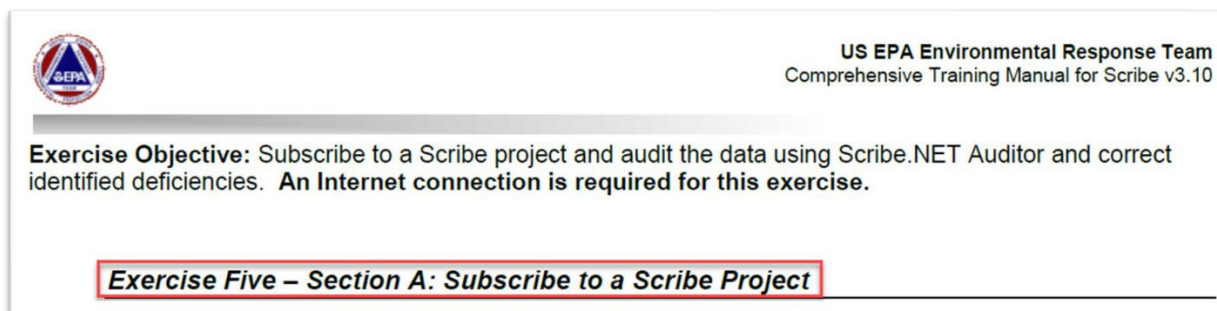
### Exercise One – Scribe Basics

**Exercise Objective:** Start a new Scribe project, customize pick lists and input 5 Soil/Sediment samples. Print sample labels and create a custom Chain of Custody.

**Exercise One - Section A: Creating a New Scribe Project**

or **Subscribe to a Scribe Project (page 39)**.

*Figure 2. Training Exercises - Exercise Five about Subscribing to a Scribe Project*



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## TRAINING EXERCISES

### Exercise Five – Section A: Subscribe to a Scribe Project

**Exercise Objective:** Subscribe to a Scribe project and audit the data using Scribe.NET Auditor and correct identified deficiencies. **An Internet connection is required for this exercise.**

**Exercise Five – Section A: Subscribe to a Scribe Project**

After creating your project or subscribing to an existing one, you will need to fill in the [eight](#)

[required Site Information fields](#) (as listed below) before moving onto Sample Data entries. After populating all the required fields, [download the R9 All Sites Auditor Rules](#) locally and audit your data before submission for publication.

## New Scribe Project

If you are creating a new project, make sure to follow the Region 9 **Project Name Nomenclature (Section 1 below)**. The properly constructed name will be entered in the 'Site Name' field in the Site Info page of the Scribe software. After creating the unique project name for your new project, fill in the Region 9 **Required Fields (Section 2)** of this document. All Required Fields are identified in the graphic below with red arrows.

*Figure 3. New Scribe Project and populating the Required Information in Scribe*

The screenshot shows the Scribe.NET software interface. The left sidebar contains a tree view with categories like Planning, Sampling, Sample Management, and Custom Tasks. The main window displays the 'Site Info' page for a project named 'CarsonRiverMercurySiteOU1\_RM\_EPA\_C\_V\_19930427\_P'. The 'Site Info' tab is selected, and a red box highlights it. Red arrows point to the following fields: Site Name, Site #, Location, Site State, NPL Status, Site Description, EPA Region, and EPA Contact Name. The 'Site Info' page includes fields for Site Name, Site #, Location, Site State, Site Action, Response Authority, NPL Status, Site Description, Site Phone, EPA Organization, EPA Region, EPA Contact Name, EPA Phone, Account Code, CERCLIS, and Remarks. The 'Scribe.NET Info' section at the bottom shows Project ID: N/A, Subscription: ABC Landfill Site(3384) Version 15 Last Updated 11/12/2021 10:43:51 AM, and Subscription ID: 1530.

Field	Value
Site Name	CarsonRiverMercurySiteOU1
Site #	abc007
Location	Carson River
Site State	NV
Site Action	
Response Authority	CERCLA
NPL Status	NPL
Site Description	Mercury Site
Site Phone	
EPA Organization	
EPA Region	9
EPA Contact Name	
EPA Phone	
Account Code	
CERCLIS	
Remarks	

**Scribe.NET Info**

Project ID: N/A

Subscription: ABC Landfill Site(3384) Version 15 Last Updated 11/12/2021 10:43:51 AM

Subscription ID: 1530

Additionally, fill in any other Site Info fields that are known for the project at hand.

## 1. Project Name Nomenclature

Fill the Project Name field (required) according to the nomenclature below:

<SiteName>\_<Activity>\_<Originator>\_<DataType>\_<Statusofdata>\_<Date>\_<PII>

An example of this Project Name Nomenclature can be seen for the Carson River Mercury Site project:

- a) CarsonRiverMercurySiteOU1\_RM\_EPA\_C\_V\_19930427\_P (47 char)
- b) CarsonRivMercOU1234567891011\_RM\_EPA\_C\_V\_19930427\_P (50 char)

The following table explains the project name identifiers used to construct a properly formatted project name.

*Table 2. Instructions for constructing a properly formatted project name*

Fields in Project Name	Maximum Characters	Instructions
Site Name	27	Be as specific with Site Name as possible
Activity	2	Enter 'RV' for Removal; 'RM' for Remedial; 'SA' for Site Assessment; 'ER' for Emergency Response; 'RP' for Responsible Party
Originator	3	Enter 'EPA' or 'PRP' (Potentially Responsible Party)
Data Type	1	Enter 'A' for Analytical; 'F' for Field; 'C' for a Combined analytical and field project
Status of Data	1	Enter 'P' for Preliminary Data and 'V' for Validated
Date	8	Enter the date of submission in 'YYYYMMDD' format
PII (see <a href="#">Appendix</a> )	2	Enter 'P' if the submission contains PII; enter 'NP' if the submission does not contain PII

Include Operable Unit(s) (OU) as part of the Site Name within the Project Name, if applicable. If there is only one OU or other kind of site distinction, follow Example A and elongate Site Name. If there are multiple OU's within the boundaries of the data points being submitted, follow Example B and abbreviate and truncate the 'Site Name' before the OU's as much as possible to fit within the 27-character limit. The Site Info field should not be left blank.

## 2. Required Fields

Fill in the required Scribe fields as indicated in the table below using the valid values specified in [R9\\_Scribe\\_ValidValues.xlsx](#), if applicable. Follow the Instructions column to the best of your ability and do not leave any of these fields blank in your submission. The total number of characters allotted for each field is provided here to encourage detailed and specific

submissions. Some fields provide drop-down menus; however, each field can be populated with a more specific entry (e.g., Site Description).

After populating all the required fields, refer to the [Environmental Response Team \(ERT\) Comprehensive Training Guide](#) for instructions on continuing with the data upload process prior to auditing the entire submission. Revisit this guide and follow the instructions in the [Audit Data Section](#) to complete the auditing process and publish to Scribe.net.

*Table 3. Instructions for completing the audit process and publishing to Scribe.net*

Scribe Caption	Scribe Database	Table Name	Valid Values	Characters Allotted	Instructions
Site Name	Site Name	Site	No	50	See Project Name Nomenclature in Section 1
Site #	Site Numb	Site	No	12	Fill this field with EPA ID if data is from an NPL/SFD Site R09YYYYMMDD with data submission date if non-NPL/SFD Site
Location	Area	Site	No	60	Fill this field with City Name; or County Name if on unincorporated land; or multiple City's names if it intersects multiple
Site State	Site_State	Site	Yes	20	Fill this field with State Abbreviation; or multiple State Abbreviations separated by '/' (e.g., CA/NV/AZ)
NPL_Status	NPL_Status	Site	Yes	20	Fill this field with one of the two options in the drop-down menu ('NPL'; 'Non NPL')
Site Description	Description	Site	No	50	Fill this field either with one of the drop-down options, or fill with more appropriate description; can use multiple words to be specific with description

EPA Region	EPARegionNumber	Site	Yes	10	Fill this field with drop-down menu number '9'
EPA Contact	EPAContact	Site	No	50	Fill this field with the name of the OSC or RPM
Latitude	Latitude	Location	No	FLOAT	Fill this field with Latitude retrieved from GPS
Longitude	Longitude	Location	No	FLOAT	Fill this field with Longitude retrieved from GPS

### 3. Audit Data

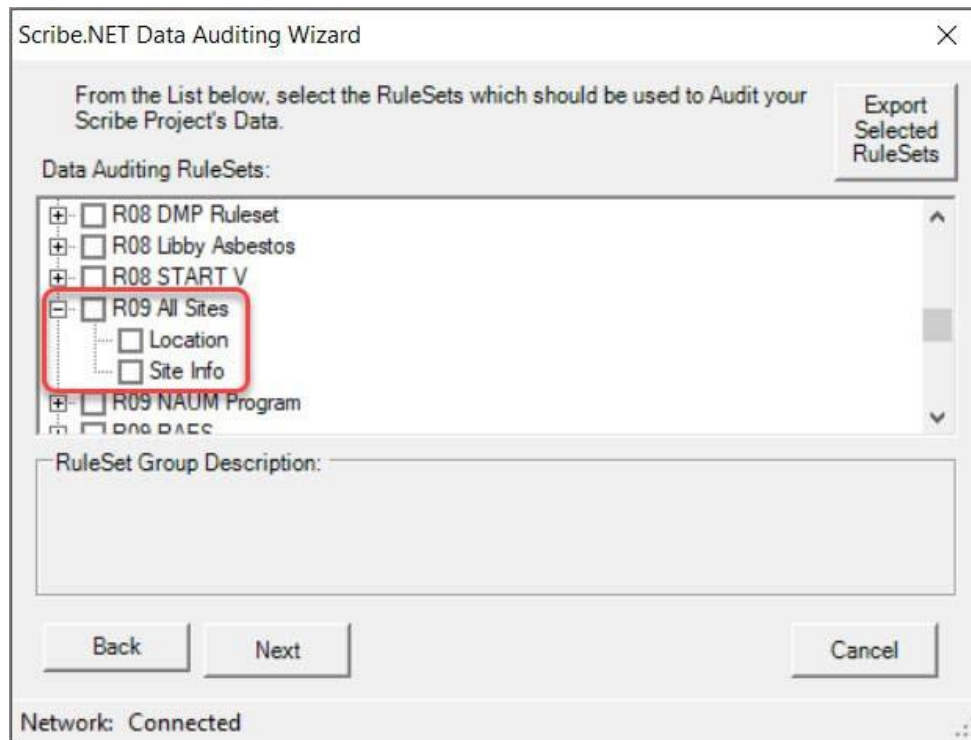
Once you have finished filling out required fields and finished uploading corresponding data, follow the instructions in the [Environmental Response Team \(ERT\) Comprehensive Training Guide](#) to Audit Data (see Exercise Five – Section B: Audit the ABC Landfill page 42). Follow the instructions below in conjunction when selecting the Auditor RuleSet for Region 9.

*Figure 4. EPA Scribe Exercise Five Section B Audit the ABC Landfill*



1. Select 'File' and under 'Scribe.NET' select 'Audit Data' to specify the ruleset created to enforce the rules from above.

Figure 5. Scribe.NET Data Auditing Wizard



2. Instead of selecting the 'ERT Training Landfill Site' Data Auditing RuleSet from the ERT Guide, select 'R09 All Sites' to run your current submission against.
3. Select the 'Site Info' rules under R09 All Sites to audit against the required fields in the Site Info page, and the 'Location' rules as well to make sure there aren't any missing coordinates from the submission. You must select both before submitting your publication.
4. If there are any missing fields, there will be an error message and you can view the errors in the Audit Log File that need to be fixed.
5. Edit the errors until the audit runs successfully.
6. Select 'File' and under 'Scribe.NET' select 'Publish' to submit final audited data.

## Appendix: Handling PII

PII is any information about an individual maintained by an agency, including, but not limited to, financial transactions, medical history, and criminal or employment history and information which can be used to distinguish or trace an individual's identity, such as their name, address, social security number, date and place of birth, mother's maiden name, biometric records, etc., including any other personal information which is linked or linkable to an individual.

Following the naming conventions prescribed in this document, add 'P' to the end of the file name for any submission that contains PII or 'NP' for any submission that does not contain PII.

## Document Information

Agency: U.S. EPA

Office: R9 Technology and Data Solutions Center

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