ID Types

When you are recording an identification, ARM will ask you to specify "ID Type." The ID Types in ARM relate to Identification Authority, reporting requirements, and how the Diagnostic Request will be routed, e.g., whether the identification needs to be escalated beyond the Plant Inspection Station.

As ARM gains additional features, the system also will track identifications by Area Identifiers working to gain Earned Identification Authority. Earned Authority is granted by National Specialists or National Identification Services (NIS) after the Identifier has demonstrated a proficiency in identifying a particular pest. The current version of ARM is a first step in addressing Identification Authority functionality.

ID Types are found on the "Determination Information" page in the required "ID Type" field:

	ID Type *			
	Select Tentative - Route to NS Tentative - Route to Al Earned - Final Provisional - Final Pursuing Provisional Conferred - Final Conferred - Regulatory ID Conferred - Continuity of Operatio	ns		
USD	United States Department of Agriculture Annal and Plant Health Impection Benice			
⊞ i	Determination Information			Urgent
Ē	DR02			
ß	1 Diagnostic Request			Overtime?
Ľ	DR ID: PIS318060009-DR02			No 🗸
?	Pest ID: Priority: Limont	Inspection Location: Test PIS3 PPQ	Inspection Date: 06/13/2018	1960
	Acknowledge Receipt * 🗹 Accept For ID * 🗹	Assigned to: Select	Multi Taxa Present:	
	Determination		Host Information	
			WPM Present Yes	
	Identification Cexception	1. Commodity: Achillea sp Achillea sp. (PM)	^	
	Thipinae	✓ 0	Destination: Virginia Host Proximity: On	
	ID Type * Math	* bo	Host Part: Cutting	
	Bends Tendate - Routor to INS Tendate - Routor - Routor Provisional Conternet - Routifier Conternet - Routifier	phological 🗸		~

1. ID Type drop-down menu expanded. Close-up of the drop-down menu is shown above.

<u>NOTE</u>: If you want to forward to a National Specialist, <u>choose only "Route to NS."</u> <u>**DO NOT select "Tentative Route to AI," if you know of an Area Identifier who is acting as a National Specialist. In that case, select "Tentative Route to NS."**</u>

	Show Active Show Complete: 1 Day Show Complete: 3 Days Show Complete: 7 Days Show Complete: 30 Days Show All
USD/	United States Department of Agriculture Animal and Plant Health Inspection Service
⊞	Test PIS3 PPQ: Area Identifier Workspace & Diagnostic Exclusion Options
i	
ľ	ଫ Diagnostic 🌣
ß	5 V records per page Filter Form Date MM/DD/YYYY
	Inspection Inspection Shipment Show Complet: 3 Days
?	Urgent 03/22/2018 PIS318030011- Test PIS3 CN-XYZ123 Not Gaura Argentina Entomology Aphididae Superv (Morphological) DR01 PPQ Present lindheimeri - TestPIS Gaura lindeheimeri (PM) [Caura

2. Drop-down menu on the Workspace that allows you to select whether you will look at the Active, Complete, or All Diagnostic Requests. The default view shows the active Diagnostic Requests.

Understanding ID Types

All routing is done <u>automatically</u> when ID Type is submitted. ID Types are defined as follows.

- <u>Tentative -- Route to NS</u>: Select this value to route a Diagnostic Request (DR) directly to a National Specialist. The DR is routed to the National Specialist immediately upon saving a DR with a "Tentative Route to National Specialist" ID Type. The priority for the DR is not affected by this ID Type, and the DR no longer shows up in the Area Identifier's Workspace. If you need to find this DR record on your Area Identifier Workspace, you have to change your filter to "Show Completed" or "Show All" (see fig. 2 above) and then search for the DR by number. The status will display as "NS Pending Specimen Receipt.
- <u>Tentative Route to AI</u>: Select this value to route a DR to another Area Identifier. Upon saving a DR with a "Tentative Route to Area Identifier" ID Type, a "Route to AI" field will appear below with a drop-down menu from which you must select the appropriate Area Identifier location, as shown below.

Click the \checkmark to display the drop-down menu that shows all locations and select the appropriate location.

ID Type *	
Tentative - Route to AI	~
Route To AI *	_

3. ID Type and Route to Al fields

At that point, you will be able to submit the DR. The status on the workspace will change to "AI Pending Specimen Receipt" on all workspaces and the DR will appear as active in the location to which it was routed.

Records that have been routed to the wrong AI location can be claimed by using the Claim DR functionality. See the "Claim a Diagnostic Request" user guide for more information.

In the original AI's location, the DR can be found in the Diagnostic table by searching under the "Completed" options or "Show All" in the drop-down menu (fig. 2).

In addition, the DR forwarded to another AI can be viewed in the original AI's Exclusion Options pane by choosing the "Show Tentative IDs," as shown below.

Click the \checkmark to display the drop-down menu and select "Show Tentative IDs" to see the DR forwarded to another Area Identifier.

Show Tentative IDs	~			
Exclusion Options				
20 v records per page View By Commodity v		Filter	Show Tentative IDs V F om Date MM/DD/YYYY	To Date MM/DD/YYYY Ok

4. The field above the Exclusion Options table that allows you to select DRs by status. "Show Tentative IDs" has been selected.

PIS318030011													
Commodity	Consignee			Destination	In Lieu	Available Exclusion Actions	Selected Schedule(s)	Actions					
 Gaura lindheimeri - Gaura lindeheimeri (PM) 	CON52A16			Florida		Not Selected 🗸 🗸		Submit					
DR ID	Туре	Pest	Pest Affected Commodities			Exclusion Action	Schedule	Select Action					
DR01	Tentative ID	Aphididae	1	Al Pending Specimen Receipt		Not Selected 🗸 🗸	Not Selected						

5. Example DR forwarded to another AI with a tentative ID displaying in the original Area Identifier's Exclusion Options pane because "Show Tentative IDs" has been selected

- <u>Earned Final</u>: Select this value if you are making a final determination using Earned Identification Authority. Earned Authority is granted by National Specialist or National Identification Services (NIS) after an Identifier has demonstrated a proficiency in identifying a particular pest. Upon selecting the "Earned - Final" ID Type, the "Quarantine Recommendation" field will appear at the bottom of the Determination screen, and the Identifier will also be required to provide that information before the determination can be submitted. Exclusion Options will appear if "Phytosanitary Action" is selected for the Quarantine Recommendation. No additional routing occurs; that is, the DR is not routed to a National Specialist when "Earned - Final" is selected.
- <u>Provisional Final</u>: Select this value if you are making a final determination using Provisional Identification Authority. The Provisional Authority is a program restricted to Entomologists only. (See Identification Authority section of the Identifier manual for more information on this program.) Upon selecting the "Earned - Final" ID Type, the "Quarantine Recommendation" field will appear at the bottom of the Determination screen, and the Identifier will also be required to provide that information before the determination can be submitted. Exclusion Options will appear if "Phytosanitary Action" is selected for the Quarantine Recommendation. The DR is then routed to a National Specialist as a Prompt.
- <u>Pursuing Provisional</u>: Select this value if you are an Entomologist pursing Provisional Authority and an <u>additional local</u> ID will be made by the Senior Entomologist. (See Identification Authority section of the Identifier manual for more information on this program.) Upon submission, the Diagnostic Request stays in the local queue. saving the determination with the "Pursuing Provisional" ID Type. A new specimen routing form will be generated in a pop-up window, but the routing will remain within the original Area Identifier location. Because the routing will remain local, the Diagnostic Request will <u>remain</u> <u>in the Diagnostic Request Pane in the local Area</u> Identifier Workspace as an active record for <u>subsequent local determinations to be added</u>. <u>The last local determination should be added as</u> <u>a "Final" ID type</u>.
- <u>Conferred Final</u>: Select this value if you are making a final determination and quarantine recommendation using Conferred Identification Authority and the specimen does not need to be routed to a National Specialist. (Refer to the Identifier manual for explanation of Conferred Authority.) Determinations based on a "Conferred Final" ID type <u>do not</u> route to a National Specialist.
- <u>Conferred Regulatory ID</u>: Select this Type if you are making a determination and quarantine recommendation using Conferred Authority, but you still need to route the specimen to a National Specialist in order to earn Authority for the pest. NIS grants Area Identifiers authority to make quarantine decisions for various pathways based on the family or order in which a pest resides, but requires Identifiers to pursue authority if the taxa is identifiable below the granted Conferred Authority level. Typical scenarios for using the "Conferred Regulatory ID" ID Type would be wood borers found in solid wood packing material, beetles in various subfamilies of Scarabaeidae, etc. Upon saving a determination with the "Conferred Regulatory ID" ID Type and recording a quarantine recommendation, a specimen routing form will be generated, and the Diagnostic Request will be routed to the National Specialist with a Prompt status.

• <u>Conferred - Continuity of Operations</u>: Select this value if you have been instructed by NIS to use your Conferred Authority to make final identifications and quarantine recommendations due to adverse events that would affect the ability of National Specialists to receive and process Urgent Diagnostic Requests. Upon saving a determination with the "Conferred - Continuity of Operation" ID Type and recording a quarantine recommendation, a specimen routing form will be generated, and the Diagnostic Request will be routed to the National Specialist with a Prompt status.

ID Туре	Quarantine Recommendation?	Forwarded to National Specialist?	Visible in Al Workspace after Submit?	Additional Area Identifier Determinations Allowed?		
Tentative – route to NS	Only if "In Lieu" requirements met	As Urgent	Show Complete*	No		
Do not select this ID type if you want to send to an AI Acting as an NS. See the explanation above.			Show All			
Tentative – route to AI	Only if "In Lieu" requirements met	No	Show Complete* Show All	Yes		
Earned - Final	Yes	No	Show Complete* Show All	No		
Provisional - Final	Yes	As Prompt	Show Complete* Show All	No		
Pursuing Provisional	No	No	Yes	Yes		
Conferred - Final	Yes	No	Show Complete* Show All	No		
Conferred - Regulatory ID	Yes	As Prompt	Show Complete* Show All	No		
Conferred - Continuity of Operations	Yes	As Prompt	Show Complete* Show All	No		

ID Type and ARM Urgent DR Workflow Implications

*On the Area Identifier Workspace, the ARM default display is "Show Active" Diagnostic Requests. Select a "Show Complete" option or "Show All" from the drop-down menu to display a Diagnostic Request with this status.ID Type.

Recording ID Type and Method

Click the \checkmark to display the IT Type drop-down menu and make the appropriate selection.

	ID Type *			
	Select Tentative - Route to NS Tentative - Route to AI Earned - Final Provisional - Final Pursuing Provisional Conferred - Final Conferred - Regulatory ID Conferred - Continuity of Operations	5		
USD	United States Department of Agriculture Annual and Paul Paul Madh Impection Berrice			≜ ∢
⊞ i	Determination Information		Urgent	
Ē	DR02			
	Diagnostic Request DR ID: PIS318060009-DR02			Overtime?
?	Pest ID:	Inspection Location: Test PIS3 PPQ	Inspection Date: 06/13/2018	
	Priority: Urgent Acknowledge Receipt * 🗟 Accept For ID * 🗟	Current Location: Test PIS3 PPQ Assigned to: Select.	DR Status: AI Diagnostic Request in Progress Multi Taxa Present: Split	
	2 Determination		Host Information WMM Present Yes DR Remarks:	
	Determination * Thipinae	✓ Q	1. Commodity: Achillea sp Achillea sp. (PM) Orgin: Barbados Destination: Vignita Host Proximity: On Host Part: Cultion	Ŷ
	D Type * Method * Testario * Role to Mi Personal Personal Personal Personal Conference - Regulation () Conference - Configuration Conference - Regulation () Conference - Regulation () Configuration - Conf	apost 🗸 🗸		v

6. ID Type drop-down menu expanded. Close-up of the drop-down menu is shown above.

How ID Type Affects Status on the Workspace

Final ID Types

When a Diagnostic Request has been completed with a final ID in these categories, status will read "Diagnostics Completed," if an appropriate "Show Complete" option or "Show All" has been selected in the marked field, as shown below. ID Types that complete diagnostics are:

- Earned-Final
- Provisional-Final
- Conferred-Final
- Conferred-Regulatory ID
- Conferred-Continuity of Operations

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⊞	Test PIS3 PPQ: Area Identifier Workspace Diagnostic Disposition View Statistics												ø
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Ē	양 Diagnostic	۰.							_				Acknowledge Rece
ß	5 v records per page	:					Filte	r	Show	Complete: 30 Days 🗸	From Date MM	DD/YYYY To Dat	e MM/DD/YYYY C
Ľ	Images Priority	Inspection Date	🏥 DR ID	Inspection	Shipment	IT WPM	IT Commodity	1 Origin	11 Discipline	Determinatio	n II Inspector	11 Assigned To	11 Status
?	Urgent (Morphological)	03/22/2018	PIS318030011- DR01	Test PIS3 PPQ	CN:XYZ123	Not Present	Gaura lindheimeri - Gaura lindeheimeri (PM) [Gaura sp Gaura sp. (PM)]	Argentina	Entomology	Aphididae	Supervisor2 TestPIS3	Select Owner	Al Pending Specimen Receipt
	Urgent (Morphological)	06/13/2018	PIS318040009- DR04	Test PIS3 PPQ	CN:2452345	Not Present	Ageratum sp Ageratum sp. (PM)	Argentina	Entomology	Aphididae	Supervisor2 TestPIS3	Select Owner	✓ Diagnostics Completed
	Urgent (Morphological)	06/13/2018	PIS318040009- DR03	Test PIS3 PPQ	CN:2452345	Not Present	Agastache sp Agastache sp. (PM)	Argentina	Entomology	Aphididae	Inspector1 TestPIS3	Select Owner	✓ Diagnostics Completed
	Urgent (Morphological)	06/13/2018	PIS318050004- DR02	Test PIS3 PPQ	IN:051018	Present	Cuphea sp Cuphea sp. (PM)	Aruba	Entomology	Aphididae	Inspector1 TestPIS3	Select Owner	✓ Diagnostics Completed
	Urgent (Morphological)	06/13/2018	PIS318040009- DR02	Test PIS3 PPQ	CN:2452345	Not Present	Agave arizonica - Agave arizonica (PM)	United States of America	Entomology	Aphididae	Inspector1 TestPIS3	Entomology, TestPIS3	✓ Diagnostics Completed
	Showing 1 to 5 of 32 entries										First Pre	evious 1 2 3 4	5 6 7 Next Las

ID Type – Tentative – Route to NS

When a Diagnostic Request has been forwarded to a National Specialist under a Tentative ID Type, status will display as "NS Pending Specimen Receipt," if an appropriate "Show Complete" option or "Show All" has been selected in the marked field:

										S	NS Pend	ling Recei	pt		ຽ	
USD/	United S Animal an												S	earch eve	ents Q	≗ ∢
⊞	Hono	olulu PIS:	Area Id	entifier Wo	rkspace				및 Diag	nostic 🖨 Exc	clusion Options					Q o
i															Acknowledge	udas Deceint
	ֆ D	iagnostic	0									_			Poretonio	oğe neveşiri
Ľ	50 🗸	records per page							Filter		Show All	rom Date	MMDD/YYYY	To Date	MM/DD/YYYYY	Ok
	Images	Priority 1	Inspection Date	IT DR ID	Inspection Location	Shipment	J† WPM	11 Commodity	1 Origin	1 Discipline	e 🕼 Determination	1 Inspecto	r 🗄 Assigned To		IT Status	17
?		Urgent (Morphological)	07/06/2018	HIHON18070001- DR02	Honolulu PIS	FLT:018	Not Present	Renanthera sp Renanthera sp. (PM) - CITES II	Japan	Plant Pathology	Fusarium sp. (Nectriaceae)	Derksen Andrew I	Select Owner	~	Pending Treatmer Recommendation	at
		Prompt (Morphological)	07/10/2018	HIHON18070003- DR01	Honolulu PIS	SB:123- 09876543	Not Present	Multiple	Taiwan	Plant Pathology	Puccinia angelicae Fuckel (Pucciniaceae)	Derksen Andrew I	Select Owner		NS Pending Specimen Receipt	C

ID Type – Tentative – Route to Al

When a Diagnostic Request has been forwarded to another Area Identifier under a Tentative ID Type, status will display as "AI Pending Specimen Receipt," if an appropriate "Show Complete" option or "Show All" has been selected in the marked field:

		1 Status	1
		AI Pending Specimen Receipt	5
USD,	Luisid Bata Departmet of Apriculture Annu Lei Yean Nam Naperio Bata	Search events	۹ 占 ۹
▦	Test PIS3 PPQ: Area Identifier Workspace	s 🛃 Statistics	¢
	Op Diagnostic * 50 v records per page Images Priority if Date Inspection It Location It Location It Date	Non Complete: 1 Day V To Date MARCONYYY To Date MARC	Acknowledge Recep JOMMY OK
?	Urgent 06/11/2018 PI3318080006- Test PI33 PPQ IN 061118 Present Agains sp Agains sp. (PM) Amenia Botany (Morphological) CD91	Agave sp Agave Supervisor2 Botany, TestPIS3 × Sp. (PM) TestPIS3	Al Pending D pecimen teceipt

ID Type – Pursuing Provisional

Under the "Pursuing Provisional" ID Type, a new specimen routing form is generated, but the routing will remain within the Area Identifier location and the Diagnostic Request will remain active, waiting for an additional local determination to be made. Note below that the Diagnostic Request displays in the "Show Active" view. The status is "AI Diagnostic Request in Progress."

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USDA	United States Department of Animal and Plant Health Inspection	Agriculture n Service										Search even	nts	a 🛓 (
⊞	Beltsville PIS:	: Area Ide	entifier Wor	kspace				양 Diagnostic	Exclusion Opti	ons 🗠 Statistics				ن. مى
i														Q
F	U. Diagnostic	•												Acknowledge Receipt
ß	9 Diagnostio								_		- D-1-	To Date		
	50 V records per page	e						Filter		Show Active	m bate	YY TO Dale	MM/DD/	OK
	Images Priority	Date	DR ID	Location	Shipment ID	IT WPM I	Commodity	11 Origin	11 Discipline	Determination	Inspector J	Assigned To	11	Status 🎼
?	Urgent (Morphological)	06/11/2018	PIS318060006- CD01	Test PIS3 PPQ	IN:061118	Present	Agave sp Agave sp. (PM)	Armenia	Botany	Agave sp Agave sp. (PM)	Supervisor2 TestPIS3	Select Owner	~	AI Pending Specimen Receipt
	Urgent (Morphological)	04/05/2018	MDBEL18040006- DR18	Beltsville PIS	Multiple	Present	Renanthera sp Renanthera sp. (PM)	Thailand	Plant Pathology	Plant Pathology	Derksen Andrew I	Select Owner	~	AI Pending Specimen Receipt
	Urgent (Morphological)	04/05/2018	MDBEL18040006- DR17	Beltsville PIS	Multiple	Present	Renanthera sp Renanthera sp. (PM)	Thailand	Plant Pathology	Plant Pathology	Derksen Andrew I	Select Owner	~	AI Pending Specimen Receipt
	Urgent (Morphological)	04/05/2018	MDBEL18040006- DR19	Beltsville PIS		Present	Container : 1324587		Entomology	Anoplophora zonator Mesilau (Cerambycidae)		Select Owner	~	AI Diagnostic Request In Progress
	Urgent (Morphological)	06/26/2018	MDBEL18060003- DR03	Beltsville PIS	SB:123- 123456789	Not Present	Renanthera sp Renanthera sp. (PM) - CITES II	Thailand	Entomology	Aphididae	Derksen Andrew I	Select Owner	×	Al Diagnostic Request in