

# 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.

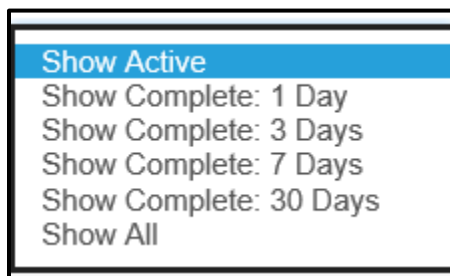
As ARM gains additional features, the system also will track identifications by Area Identifiers working to gain Earned Identification Authority. Earned Authority is granted by National Specialists or National Identification Services (NIS) after the Identifier has demonstrated a proficiency in identifying 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:

The screenshot shows the 'Determination Information' page in the ARM system. The 'ID Type' dropdown menu is expanded, showing the following options: Tentative - Route to NS, Tentative - Route to AI, Earned - Final, Provisional - Final, Pursuing Provisional, Conferred - Final, Conferred - Regulatory ID, and Conferred - Continuity of Operations. A red box highlights the dropdown menu in the main screenshot.

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

**NOTE:** If you want to forward to a National Specialist, choose only “Route to NS.”  
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.”



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Test PIS3 PPQ: Area Identifier Workspace

Diagnostic Exclusion Options Statistics

Diagnostic

5 records per page

Filter From Date MM/DD/YYYY

Images	Priority	Inspection Date	DR ID	Inspection Location	Shipment ID	WPM	Commodity	Determination	Insp
	Urgent (Morphological)	03/22/2018	PIS318030011-DR01	Test PIS3 PPQ	CN:XYZ123	Not Present	Gaura lindheimeri - Gaura lindheimeri (PM) [Gaura	Argentina Entomology Aphididae	Superv TestPIS

- 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 automatically when ID Type is submitted. ID Types are defined as follows.


- Tentative -- Route to NS:** 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.”
- Tentative – Route to AI:** 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  to display the drop-down menu that shows all locations and select the appropriate location.

**ID Type \***

Tentative - Route to AI 

**Route To AI \***

Test PIS3 PPQ 

### 3. ID Type and Route to AI 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  to display the drop-down menu and select “Show Tentative IDs” to see the DR forwarded to another Area Identifier.

Show Tentative IDs 

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**Exclusion Options**

20 records per page View By: Commodity Filter  Show Tentative IDs  From Date: MM/DD/YYYY To Date: MM/DD/YYYY

### 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 lindheimeri (PM)	CON52A16			Florida	<input type="checkbox"/>	Not Selected 		<input type="button" value="Submit"/>
DR ID	Type	Pest	Affected Commodities	Quarantine Recommendation		Exclusion Action	Schedule	Select Action
DR01	Tentative ID	Aphididae	1	AI Pending Specimen Receipt		Not Selected 	Not Selected 	<input type="checkbox"/>

### 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

- **Earned - Final**: 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.
- **Provisional - Final**: 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.
- **Pursuing Provisional**: Select this value if you are an Entomologist pursuing Provisional Authority and an additional local 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 remain in the Diagnostic Request Pane in the local Area Identifier Workspace as an active record for subsequent local determinations to be added. The last local determination should be added as a “Final” ID type.
- **Conferred – Final**: 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 do not route to a National Specialist.
- **Conferred - Regulatory ID**: 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.

- Conferred - Continuity of Operations:** 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.

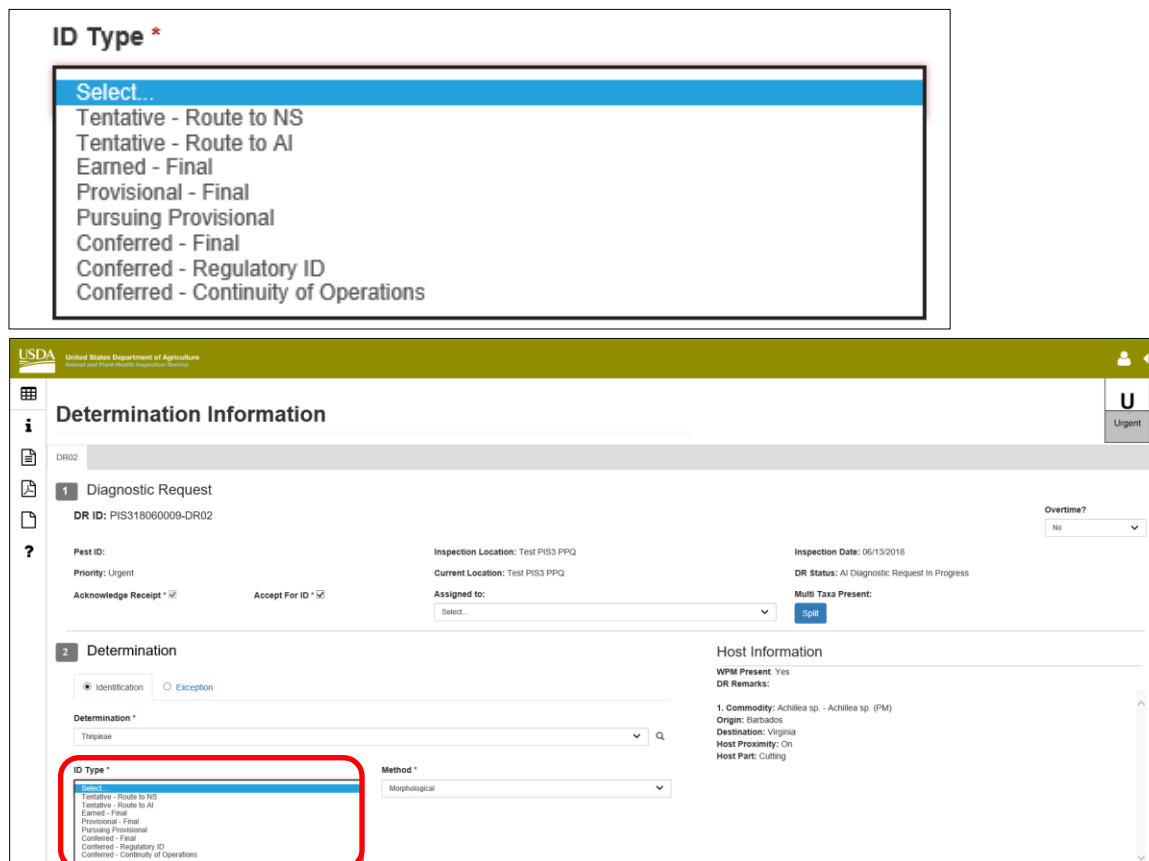
### ID Type and ARM Urgent DR Workflow Implications

ID Type	Quarantine Recommendation?	Forwarded to National Specialist?	Visible in AI Workspace after Submit?	Additional Area Identifier Determinations Allowed?
<b>Tentative – route to NS</b>  <div style="border: 1px solid black; padding: 5px; width: fit-content;">           Do not select this ID type if you want to send to an AI Acting as an NS. See the explanation above.         </div>	Only if “In Lieu” requirements met	As Urgent	Show Complete* Show All	No
<b>Tentative – route to AI</b>	Only if “In Lieu” requirements met	No	Show Complete* Show All	Yes
<b>Earned - Final</b>	Yes	No	Show Complete* Show All	No
<b>Provisional - Final</b>	Yes	As Prompt	Show Complete* Show All	No
<b>Pursuing Provisional</b>	No	No	Yes	Yes
<b>Conferred - Final</b>	Yes	No	Show Complete* Show All	No
<b>Conferred - Regulatory ID</b>	Yes	As Prompt	Show Complete* Show All	No
<b>Conferred - Continuity of Operations</b>	Yes	As Prompt	Show Complete* Show All	No

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



The screenshot shows the USDA Determination Information form. The ID Type drop-down menu is expanded, showing the following options:

- Select...
- Tentative - Route to NS
- Tentative - Route to AI
- Earned - Final
- Provisional - Final
- Pursuing Provisional
- Conferred - Final
- Conferred - Regulatory ID
- Conferred - Continuity of Operations

The form also displays the following information:

- Determination Information:** DR02, Diagnostic Request, DR ID: PIS318060009-DR02
- Pest ID:** Priority: Urgent, Acknowledge Receipt:  Accept For ID:
- Inspection Location:** Test PIS3 PPQ, Current Location: Test PIS3 PPQ, Assigned to: Select...
- Inspection Date:** 06/13/2018, Overtime?: No
- DR Status:** AI Diagnostic Request In Progress, Multi Taxa Present:
- Determination:** Identification selected, Determination: Thripidae
- Host Information:** WPM Present: Yes, DR Remarks: 1. Commodity: Achillea sp. - Achillea sp. (PM), Origin: Barbados, Destination: Virginia, Host Proximity: On, Host Part: Cutting

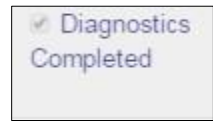
6. ID Type drop-down menu expanded. Close-up of the drop-down menu is shown above.

## 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

5 records per page

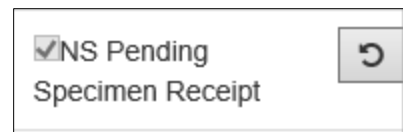
Filter  Show Complete: 30 Days From Date: MM/DD/YYYY To Date: MM/DD/YYYY

Images	Priority	Inspection Date	DR ID	Inspection Location	Shipment ID	WPM	Commodity	Origin	Discipline	Determination	Inspector	Assigned To	Status
	Urgent (Morphological)	03/22/2018	PIS318030011-DR01	Test PIS3 PPQ	CN.XYZ123	Not Present	Gaura lindheimeri - Gaura lindheimeri (PM) [Gaura sp. - Gaura sp. (PM)]	Argentina	Entomology	Aphididae	Supervisor2 TestPIS3	Select Owner...	<input type="checkbox"/> 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...	<input checked="" type="checkbox"/> 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...	<input checked="" type="checkbox"/> 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...	<input checked="" type="checkbox"/> 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	<input checked="" type="checkbox"/> Diagnostics Completed

Showing 1 to 5 of 32 entries

### 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:



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Honolulu PIS: Area Identifier Workspace

Diagnostic

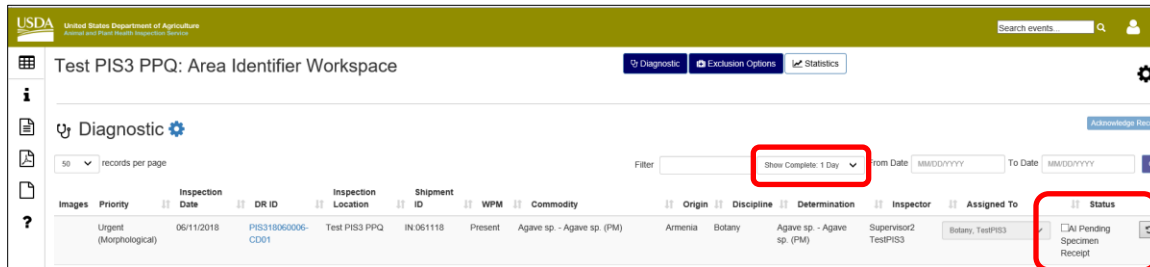
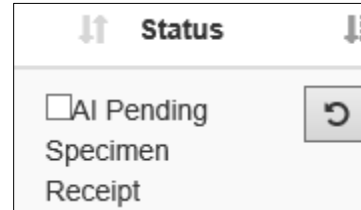
50 records per page

Filter  Show All From Date: MM/DD/YYYY To Date: MM/DD/YYYY

Images	Priority	Inspection Date	DR ID	Inspection Location	Shipment ID	WPM	Commodity	Origin	Discipline	Determination	Inspector	Assigned To	Status
	Urgent (Morphological)	07/06/2018	HHON18070001-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...	<input type="checkbox"/> Pending Treatment Recommendation
	Prompt (Morphological)	07/10/2018	HHON18070003-DR01	Honolulu PIS	SB-123-09876543	Not Present	Multiple	Taiwan	Plant Pathology	Puccinia angelicae Fuckel (Pucciniales)	Derksen Andrew I	Select Owner...	<input checked="" type="checkbox"/> NS Pending Specimen Receipt

## ID Type – Tentative – Route to AI

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:



## 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.”

