User Guide: PHSS Shipment Close Out

Purpose: This user guide will provide instruction on the following:
- How Plant Health Safeguarding Specialists (PHSS) can close out shipments, and
- How PHSS's can undo closed-out shipments

Overall Steps to close out a shipment

The following table lists the overall steps to close out an international cargo shipment. Detailed guidance for each step can be found below.

Step	Action
1	Click on the Workspace icon from the Clearance Confirmation page to return to the workspace.
2	Use the global search feature on the workspace to check for duplicate records.
3	Change the filter above the Shipments pane on the workspace to "Show Pending" (best choice, will display fewer results) or "Show All."
4	Find the shipment you need to close out.
5	Click the "Pending Close Out" link in the "Status" column. You will be sent to the Clearance Confirmation page.
6	Review the shipment data on all pages before closing out the shipment, either by: • Clicking on the breadcrumbs at the top of the page, which allows you to navigate through all steps in the record page by page, or • Using the Info page in the left-hand drawer.
7	Click on the Workspace icon when you are satisfied with the data review to go to the workspace. (If you are not satisfied with the data review, you or the user who entered the shipment needs to undo the shipment clearance from the Clearance Confirmation page using the Undo button.)
8	Find the shipment you need to close out in the Shipments table.
9	Click on the "Close Out" link in the "Close Out" column at the far right. Your shipment will disappear from the screen, if you are in "Show Pending" view. Remember to change your view back to "Show Active."
10	Change the view using any of the "Show Complete" filters or "Show All" to see the closed-out shipment. Your shipment will display with the status "Shipment Closed," and under the "Close Out" column, it will display as "Closed Out" with an Undo button alongside. • If you need to undo a closed-out shipment for any reason, see the guidance in the Undoing/Reopening a Closed-out Shipment below.

Step 1: Click on the Workspace icon.

After submitting the Clearance Confirmation, click on the Workspace icon to return to the Workspace.
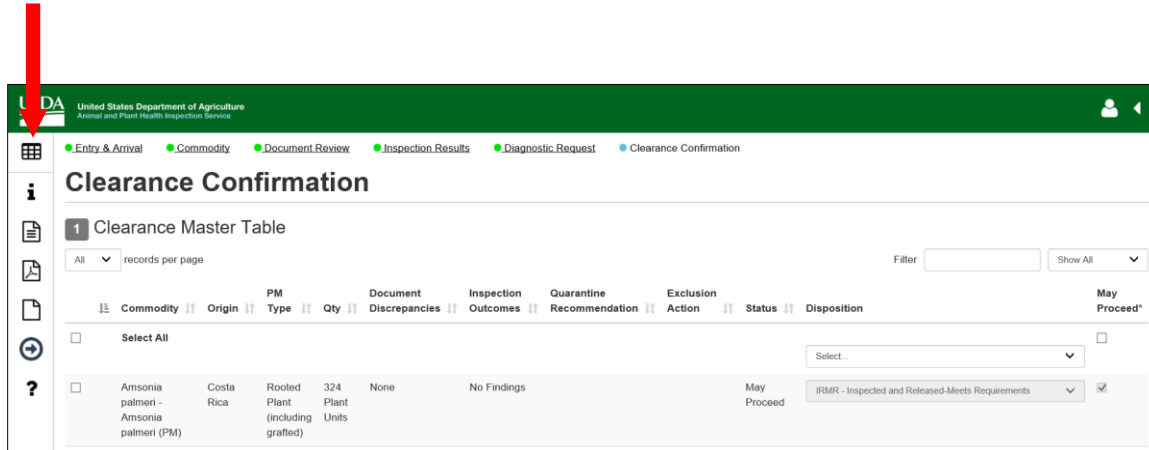
Step 2: Use the global search to check for duplicate records.

Before going any further, you need to make sure the shipment is not duplicated in ARM. To ensure that ARM does not have duplicate records of the shipment, filter the shipment records by any identifier. Identifier numbers could be:

- Shipment ID
- Customs Entry Number
- Conveyance number

NOTE: Do not use the Event ID to search for the record. The Event ID is a unique identifier for each record and so cannot be used to identify duplicate shipment records. Please see the "Search Events" user guide for detailed guidance on this feature.

Step 2a. Enter an identifier in the Search events box in the field at the top right.

If the results display only a single record, no duplicate records exist. If multiple records appear, you will need to examine the record and delete the duplicate before moving forward with the review and closing out the shipment.

In the example below, two records display – these are not duplicate records. Note that one record is the Diagnostic Request associated to the shipment.

Step 2b. If you find a duplicate record(s), contact the Help Desk and continue closing out the correct record.

Step 3: Change the filter above the Shipments pane to "Show Pending" (best choice, displays fewer results) or "Show All."

ARM defaults to the "Show Active" view. You will not see the shipment if you are in this view.

NOTE: "Show Pending" is the best choice to see this shipment because the "Pending" filter displays only those shipments that are pending close-out. "Show All" will display all shipments in the location in all statuses: active, pending, and closed.

Step 3a. Click on the drop-down arrow to the right of the "Show Active" filter to expand the drop-down menu.
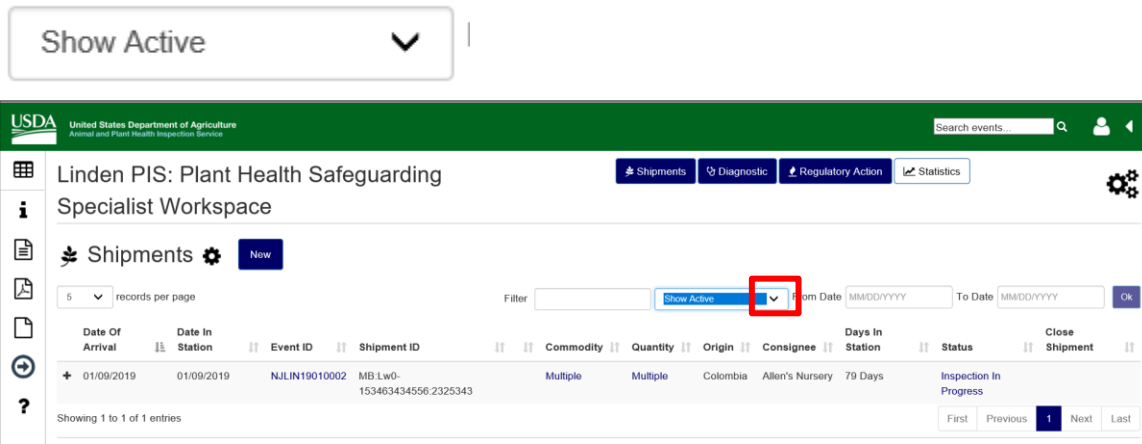
Step 3b. Make your selection.
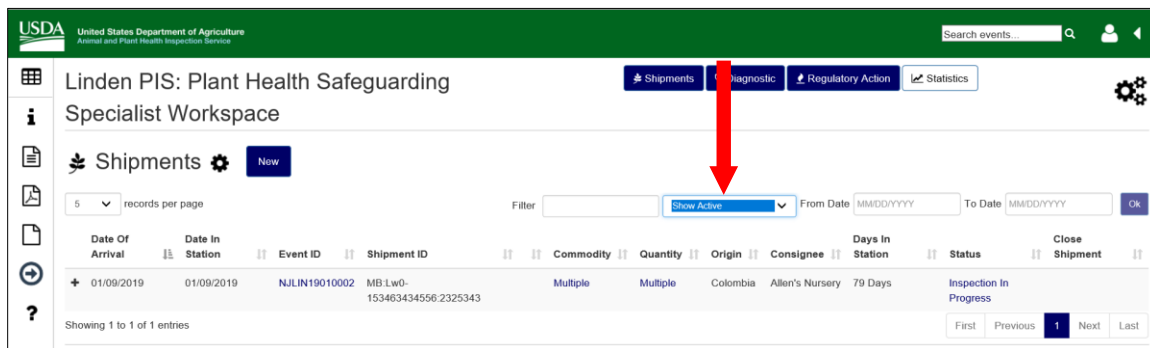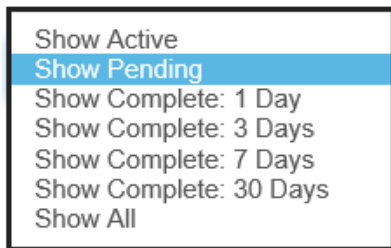
Step 4: Find the shipment you need to close out.

The shipment status will appear in the Status column as "Pending Close Out."
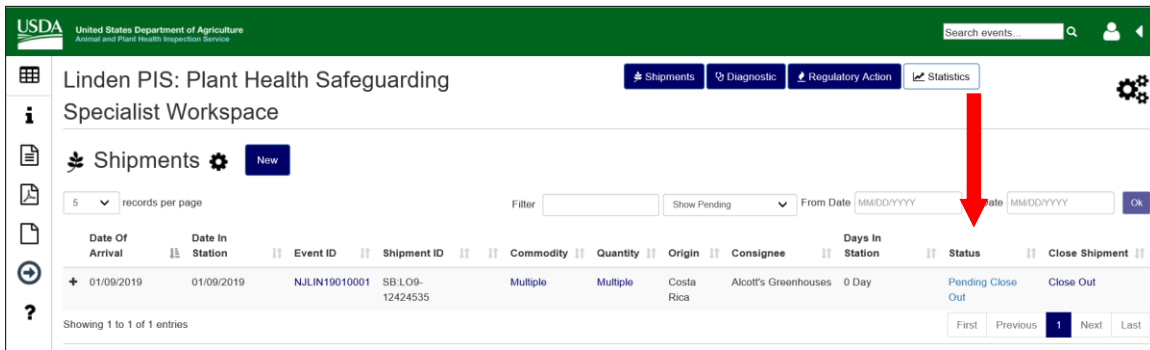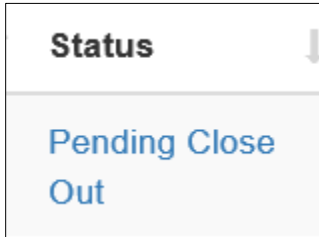
Step 5: Click on "Pending Close Out" in the Status column.

You will be sent to the Clearance Confirmation page.
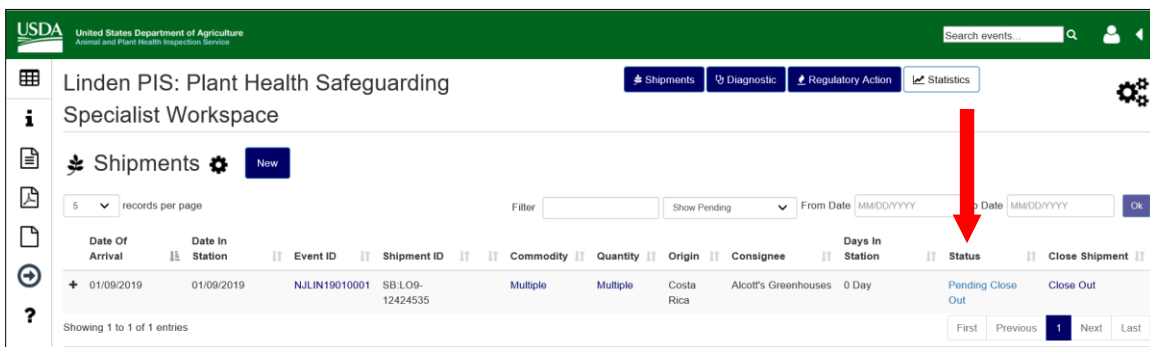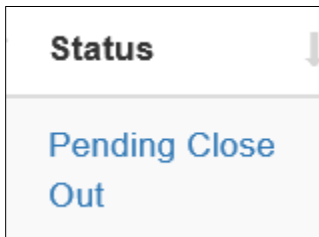
Step 6: Review the shipment data on all pages.

To close out the shipment, you must ensure that the following conditions are in place:

    a. Double check that no commodity is a Prohibited Material.
    b. Make sure that all the correct documents are associated to the commodities.
    c. Make sure that all the commodities are identified with the correct Regulatory Type and Propagative Material Type.
    d. Check that the correct Disposition Codes have been selected for commodities.
    e. Check that the correct quantities and units have been entered for each commodity.

ARM offers you two ways to do this:
- Click on the breadcrumbs at the top of the page, which allows you to navigate through all steps in the record page by page, or
- Use the Info page in the left-hand drawer.

Both ways are equally accurate; select the one that is most comfortable for you. Please see steps 6a and 6b below.

6a: Using the Breadcrumbs for review

Step 6a1. Click on each breadcrumb to be go to that page, where you can review the shipment data.

6b: Using the Info page for review

The shipment Info page shows the shipment history and full record of the shipment in reverse chronological order from the date it entered the United States.

Step 6b1. Click on the Info page icon to go to the Info page.

Step 6b2. At the top of the Info page, you will find the most recent information. Scroll down to view the entire history.

IMPORTANT: If you find anything in error during your review, <u>do not</u> close the shipment. Communicate with the appropriate staff member regarding the issue/error in the data.

Step 7: When you are satisfied with the data review, click on the Workspace icon to go to the Workspace.

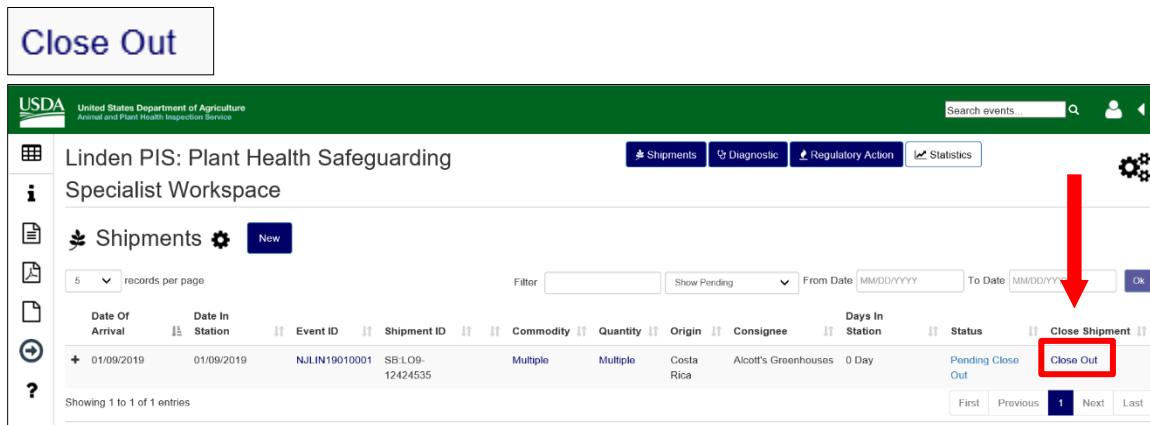The Workspace icon is at the upper left of every page of ARM.

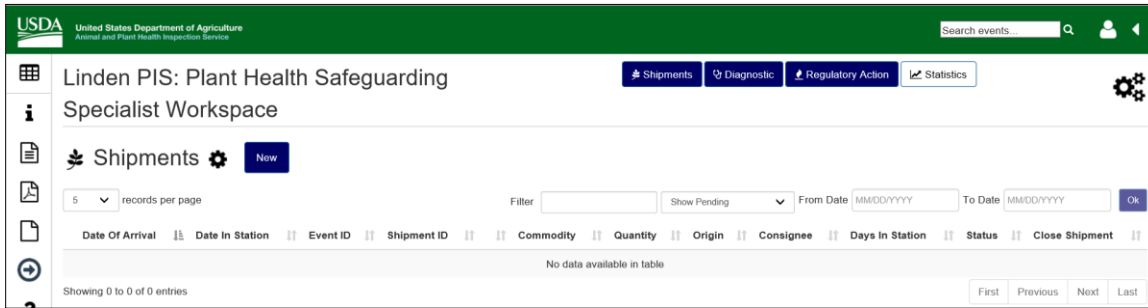## Step 8: Find the shipment you need to close out.

Make sure that you are still in "Show Pending" or "Show All" view. If you have worked on this task without interruption, ARM will have kept you in the view choice you made in step 2.
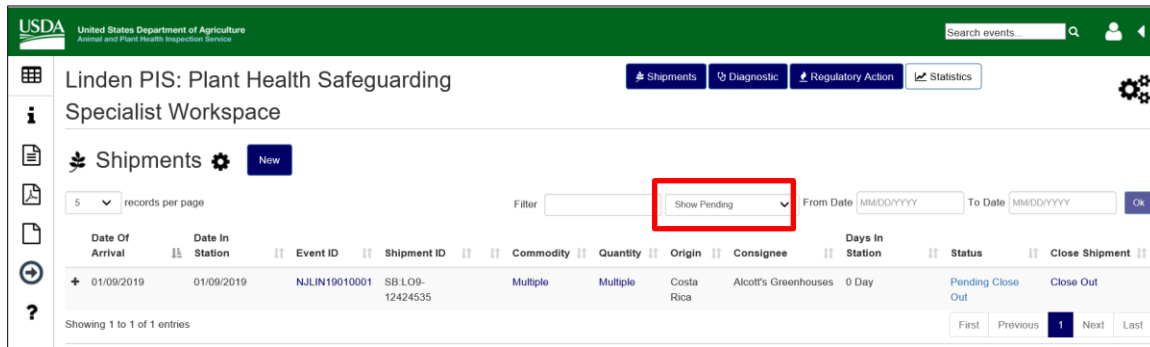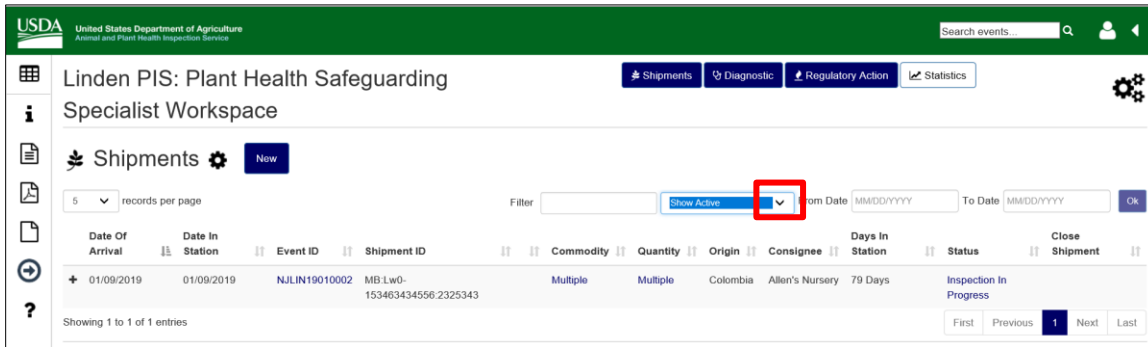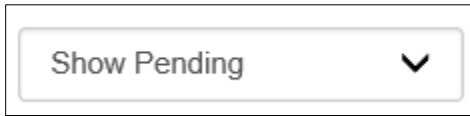

Step 9: Click on the "Close Out" link.
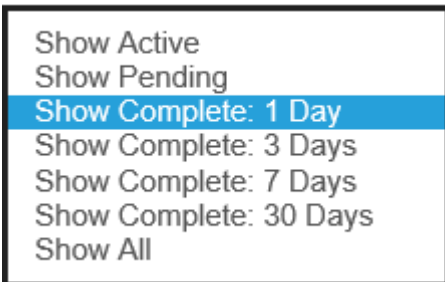
Your shipment will disappear from the screen:

Step 10: Change the view using any of the "Show Complete" filters or "Show All" to see the closed-out shipment.
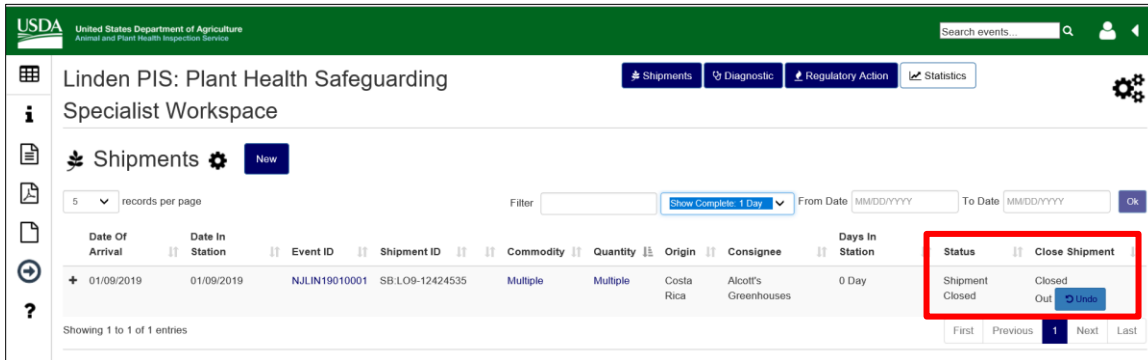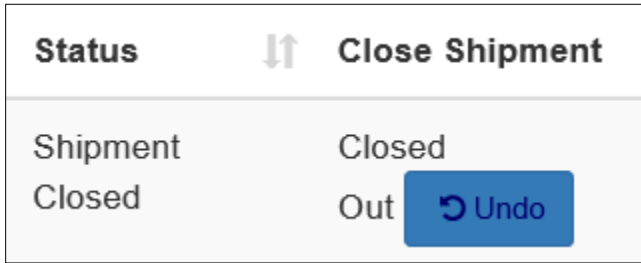
Step 10a. Click on the drop-down arrow to the right of the filter to expand the drop-down menu.

Step 10b. Make your selection.

Your shipment will display with the Status "Shipment Closed" and under the "Close Out" column, it will display as "Closed Out" with an Undo button alongside.

# Undoing/Reopening a Closed-out Shipment

Overall Steps to undo a closed-out shipment

If you need to re-open the shipment, simply display the completed shipments and click the hyperlink in the far right column.

Step	Action
1	Change the filter above the Shipments panel on the Workspace to one of the "Show Complete" options (best choice, will display fewer results) or "Show All."
2	Click the "Undo" button in the "Close Out" column at the far right. The shipment will disappear from the screen.
3	Change the view to "Show Pending" to see the closed out shipment.

Step 1: Change the filter above the Shipments panel to one of the "Show Complete" options (best choice, will display fewer results) or "Show All" on the workspace.
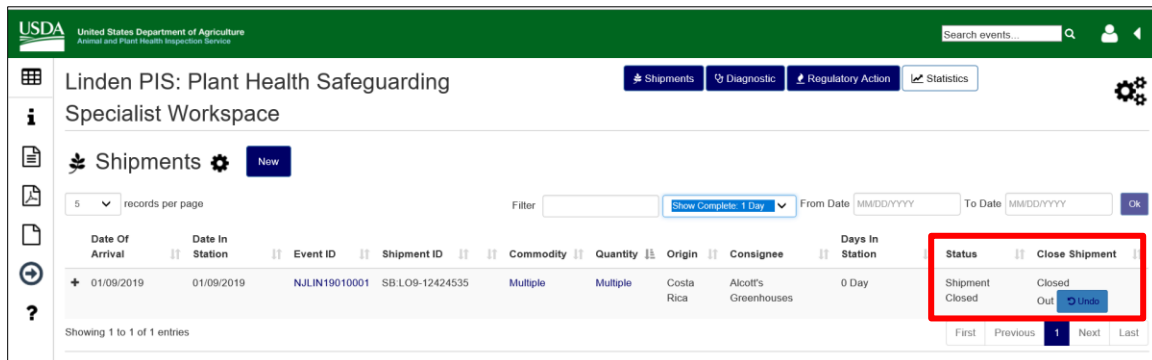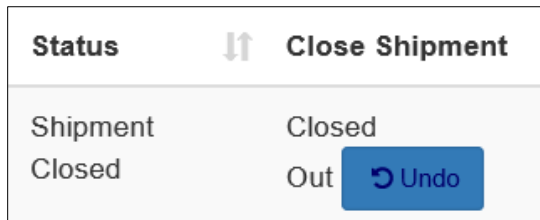
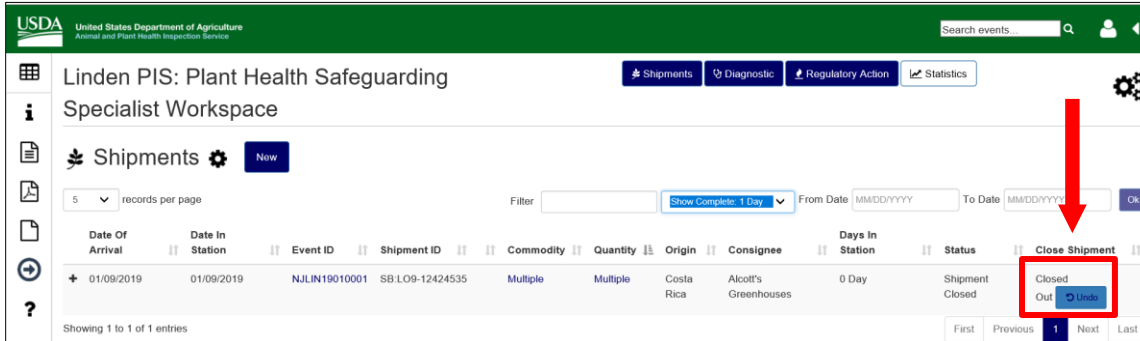**Step 1a.** Click on the drop-down arrow to the right of the filter to expand the drop-down menu.
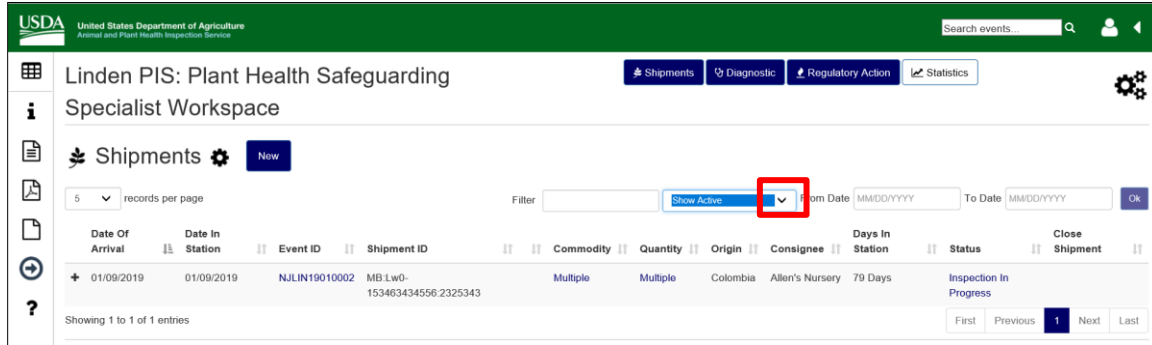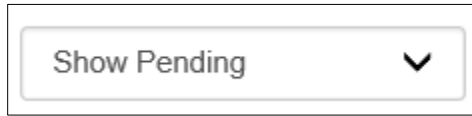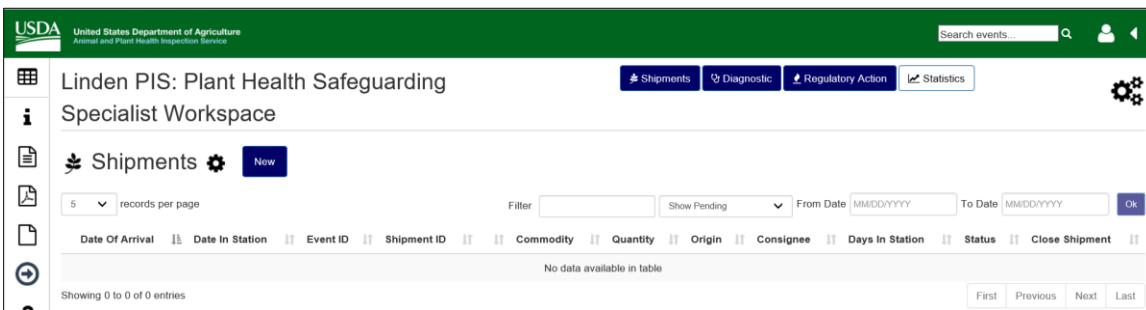

Step 1b. Make your selection.
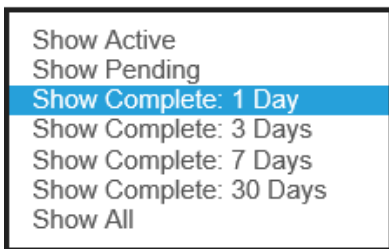
Your shipment will display with the Status "Shipment Closed" and under the "Close Out" column, it will display as "Closed Out" with an Undo button alongside.
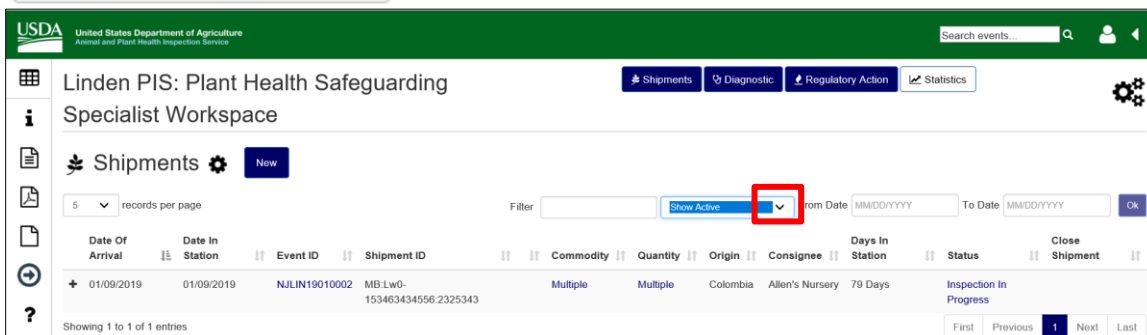
Step 2: Click the "Undo" button.

Your shipment will disappear from the screen:

Step 3: Change the view to "Show Pending" to see the closed-out shipment.

Step 3a. Click on the drop-down arrow to the right of the "Show Active" filter to expand the drop-down menu.

Step 3b. Make your selection.

The shipment will now display in its previous "Pending Close Out" status.