

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

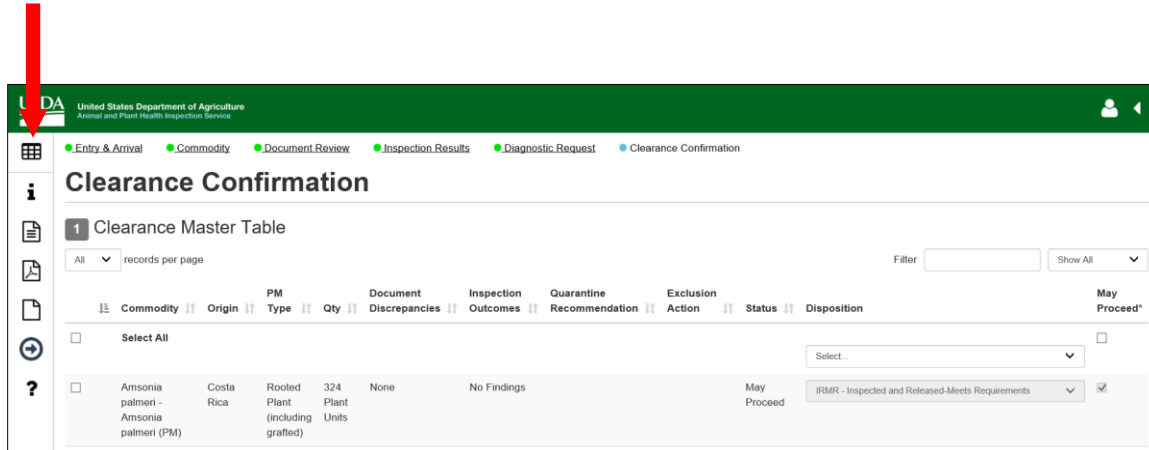
Overall Steps to close out a shipment

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: <ul style="list-style-type: none">• 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. <ul style="list-style-type: none">• 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.



The screenshot shows the USDA PHSS application interface. At the top right, there is a search bar labeled 'Search events...'. Below it, the main interface displays 'Linden PIS: Plant Health Safeguarding Specialist Workspace'. There are tabs for 'Shipments', 'Diagnostic', 'Regulatory Action', and 'Statistics'. The 'Shipments' tab is active, showing a table of shipment records. The table has columns for Date of Arrival, Date In Station, Event ID, Shipment ID, Commodity, Quantity, Origin, Consignee, Days In Station, Status, and Close Shipment. Two records are displayed:

Date of Arrival	Date In Station	Event ID	Shipment ID	Commodity	Quantity	Origin	Consignee	Days In Station	Status	Close Shipment
01/09/2019	01/09/2019	NJLIN19010002	MB.Lw0-153463434556.2325343	Multiple	Multiple	Colombia	Allen's Nursery	80 Days	Inspection In Progress	
01/09/2019	01/09/2019	NJLIN19010001	SB.L09-12424535	Multiple	Multiple	Costa Rica	Alcott's Greenhouses	0 Day	Pending Close Out	Close Out

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.

Item Type
Diagnostic Request
Shipment

The screenshot shows the USDA PHSS application interface with the search results for the shipment ID '12424535'. The search bar contains '12424535'. The results table shows two records:

Item Type	Event/RA/DR ID	Shipment ID's	Pest ID	Exam Batch ID	Inspection Location	Current Location	Status
Diagnostic Request	NJLIN19010001-DR01	SB.L09-12424535			Linden PIS	Linden PIS	Diagnostics Completed
Shipment	NJLIN19010001	SB.L09-12424535			Linden PIS		Pending Close Out

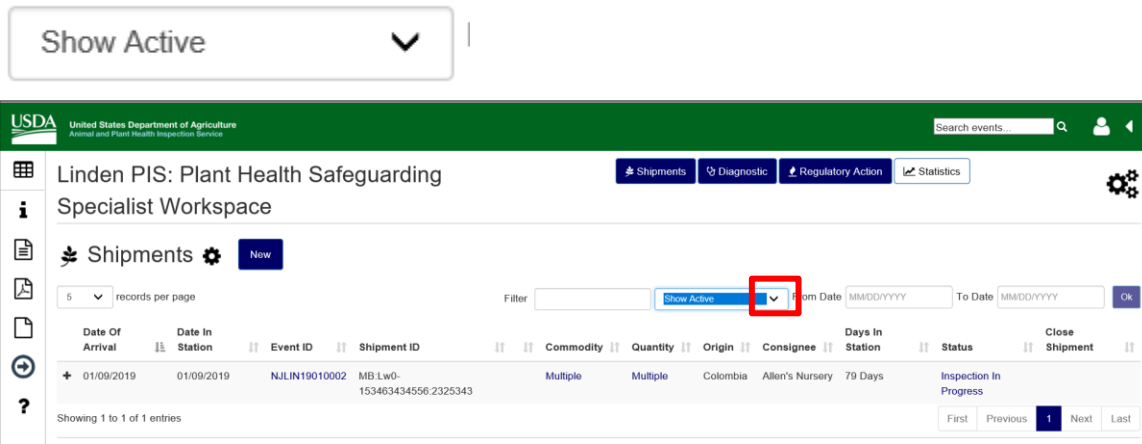
Step 2b. If you find a duplicate record(s), contact the Help Desk and continue closing out the correct record.

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

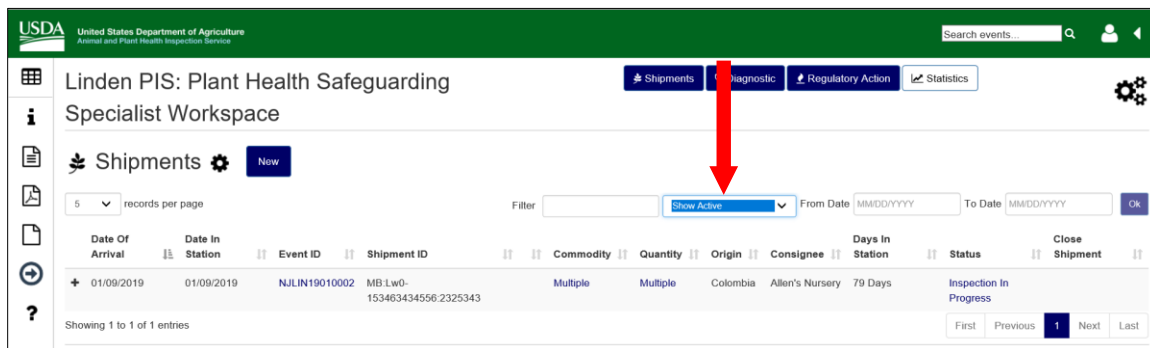
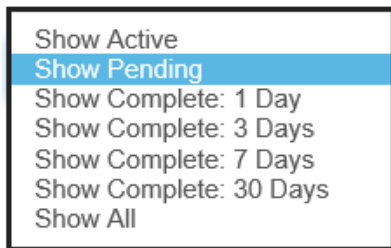
ARM defaults to the “Show Active” view. You will not see the shipment if you are in this view.

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.

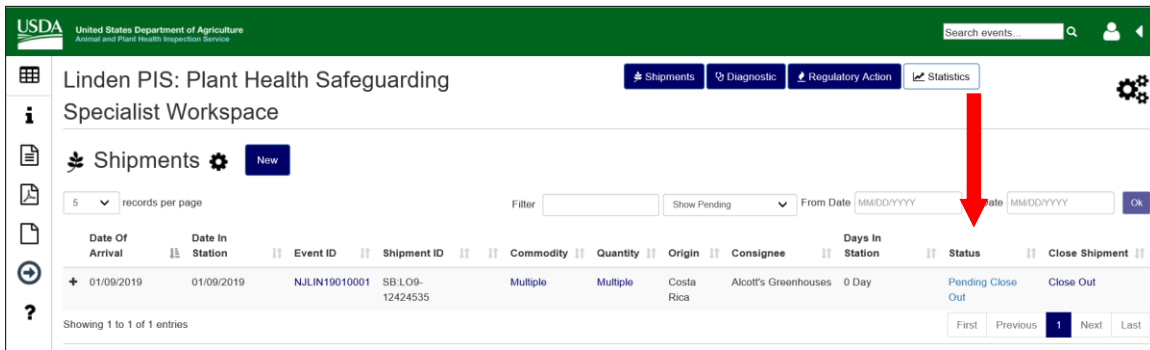
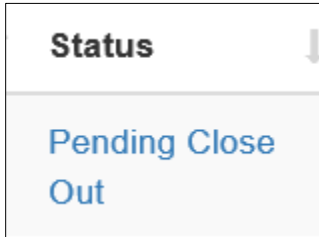


Step 3b. Make your selection.



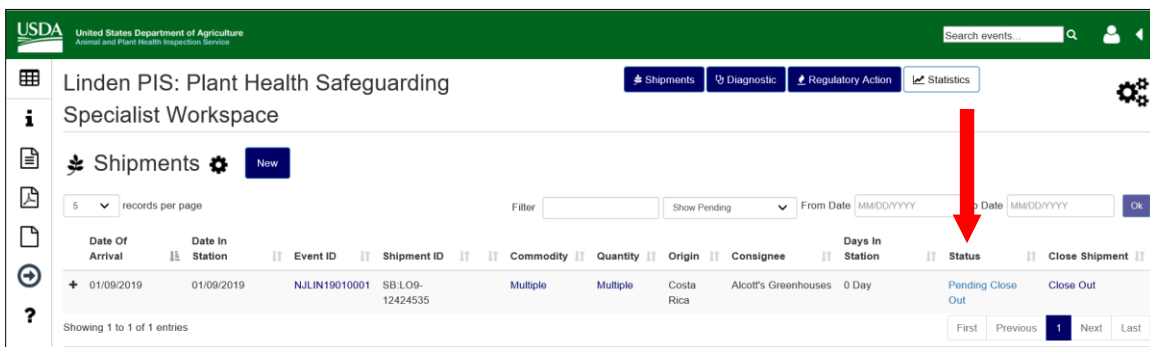
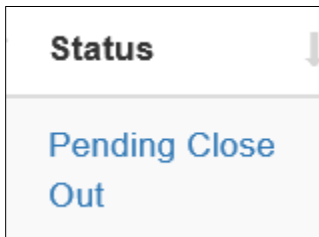
Step 4: Find the shipment you need to close out.

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:

- Double check that no commodity is a Prohibited Material.
- Make sure that all the correct documents are associated to the commodities.
- Make sure that all the commodities are identified with the correct Regulatory Type and Propagative Material Type.
- Check that the correct Disposition Codes have been selected for commodities.
- 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.

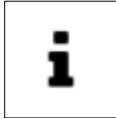
The screenshot displays the USDA ARM interface for 'Clearance Confirmation'. At the top, a breadcrumb navigation bar is highlighted with a red box, containing the following items: Entry & Arrival, Commodity, Document Review, Inspection Results, Diagnostic Request, and Clearance Confirmation. Below this, the main content area is titled 'Clearance Confirmation' and features a 'Clearance Master Table'. The table has columns for Commodity, Origin, PM Type, Qty, Discrepancies, Inspection Outcomes, Quarantine Recommendation, Exclusion Action, Status, Disposition, and May Proceed. Two rows of data are shown:

Commodity	Origin	PM Type	Qty	Discrepancies	Inspection Outcomes	Quarantine Recommendation	Exclusion Action	Status	Disposition	May Proceed
Amsonia palmeri - Amsonia palmeri (PM)	Costa Rica	Rooted Plant (including grafted)	324 Plant Units	None	No Findings			May Proceed	IRMR - Inspected and Released-Meets Requirements	<input checked="" type="checkbox"/>
Adenophora sp. - Adenophora sp. (PM)	Costa Rica	Rooted Plant (including grafted)	345 Plant Units	None	Pest	No Phytosanitary Action		May Proceed	IRMR - Inspected and Released-Meets Requirements	<input checked="" type="checkbox"/>

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.



Commodity	Origin	PM Type	Qty	Document Discrepancies	Inspection Outcomes	Quarantine Recommendation	Exclusion Action	Status	Disposition	May Proceed
Amsonia palmeri - Amsonia palmeri (PM)	Costa Rica	Rooted Plant (including grafted)	324 Plant Units	None	No Findings			May Proceed	IRMR - Inspected and Released-Meets Requirements	<input checked="" type="checkbox"/>
Adenophora sp. - Adenophora sp. (PM)	Costa Rica	Rooted Plant (including grafted)	345 Plant Units	None	Pest	No Phytosanitary Action		May Proceed	IRMR - Inspected and Released-Meets Requirements	<input checked="" type="checkbox"/>

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

Shipment Clearance

Commodity	Country of Origin	Consignee	Disposition	Released/Destroyed Date	Forwarded Via	Cargo Type	Outgoing Carrier Name	Outgoing Other Carrier Name	Outgoing Tracking Number
Adenophora sp. - Adenophora sp. (PM)	Costa Rica	Alcott's Greenhouses	IRMR	01/09/2019	Freight	Truck	N/A	N/A	N/A
Amsonia palmeri - Amsonia palmeri (PM)	Costa Rica	Alcott's Greenhouses	IRMR	01/09/2019	Freight	Truck	N/A	N/A	N/A
Discocactus ferricola (Cactaceae) (PM)	Costa Rica	Alcott's Greenhouses	IRMR	01/09/2019	Freight	Truck	N/A	N/A	N/A

Quarantine Recommendation

Diagnostic Request	Quarantine Recommendation	Diagnostic Request ID	Submitted By	Time Stamp	Recommended By
Cercospora acerigena U. Braun & Crous (Mycosphaerellaceae):Final ID	No Phytosanitary Action	NJLIN19010001-DR01	Marchena, Alex	01/09/2019	Marchena, Alex

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

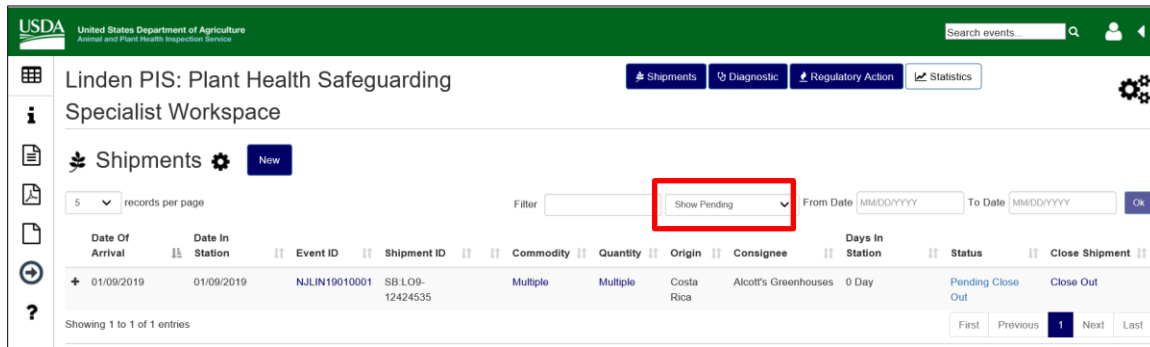
Step 7: When you are satisfied with the data review, click on the Workspace icon to go to the Workspace.

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

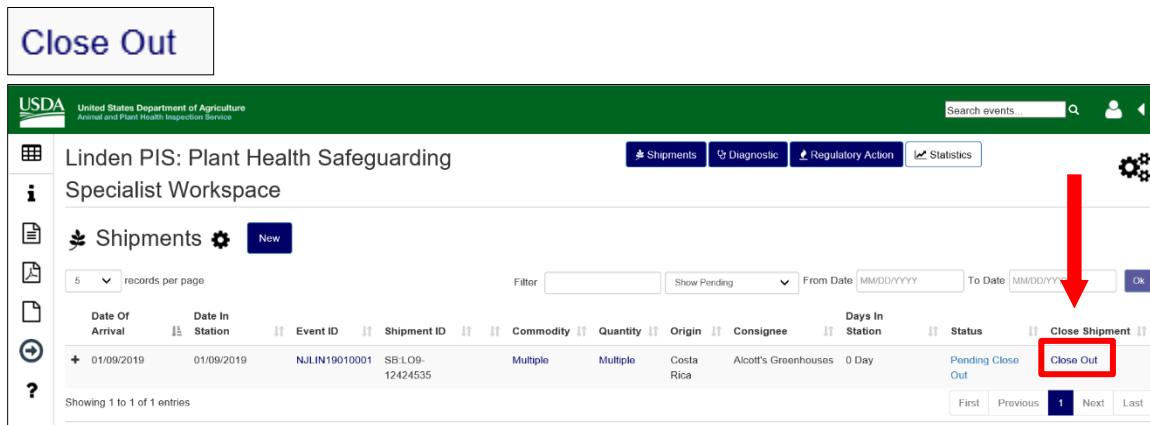


Step 8: Find the shipment you need to close out.

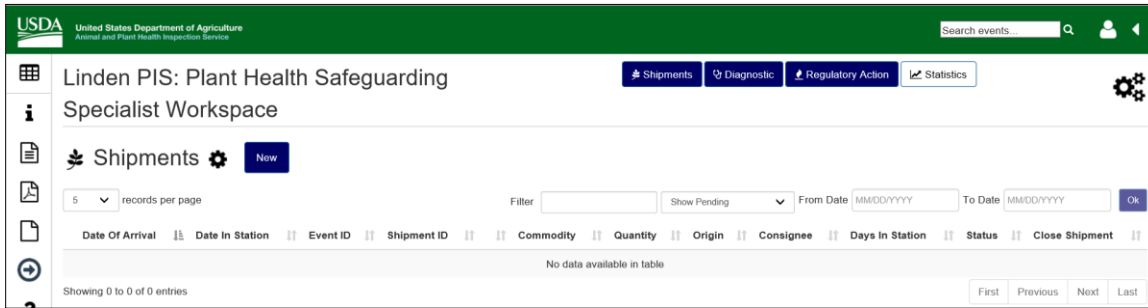
Make sure that you are still in “Show Pending” or “Show All” view. If you have worked on this task without interruption, ARM will have kept you in the view choice you made in step 2.



Step 9: Click on the “Close Out” link.

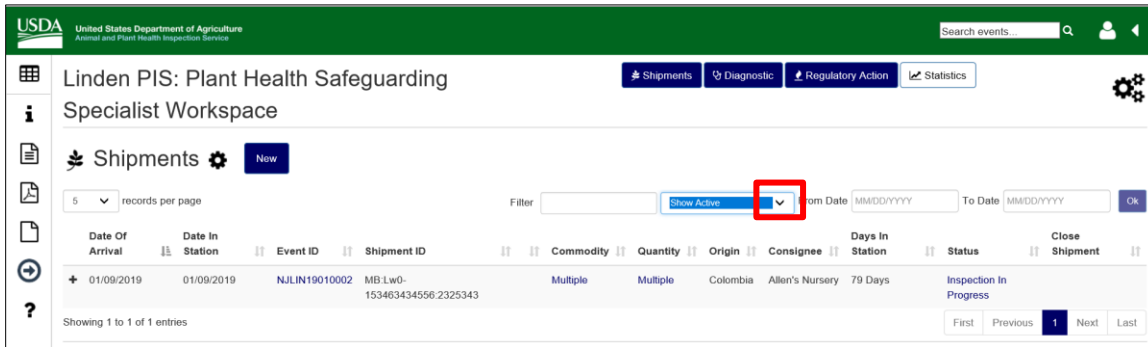
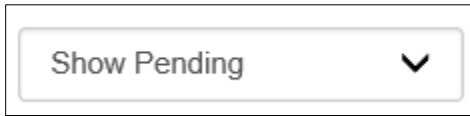


Your shipment will disappear from the screen:

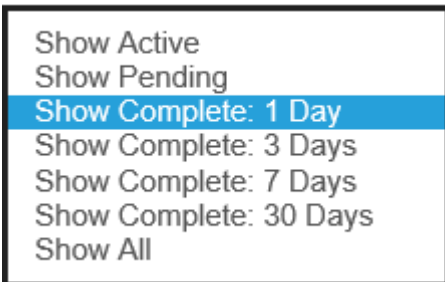


Step 10: Change the view using any of the “Show Complete” filters or “Show All” to see the closed-out shipment.

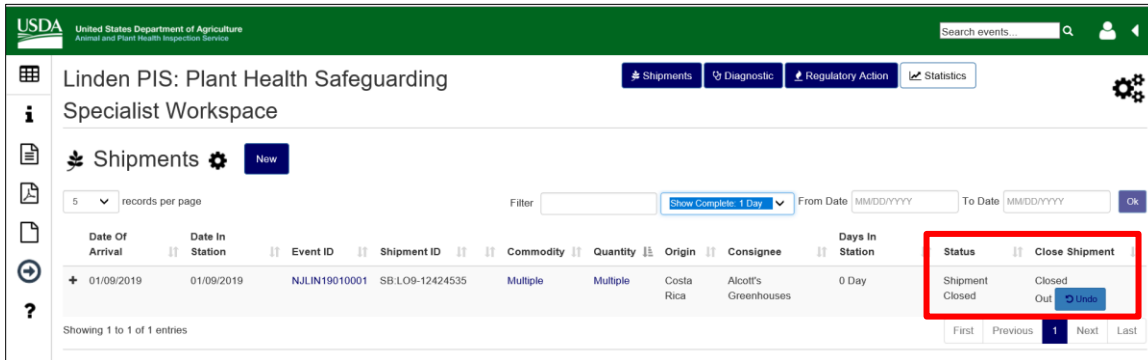
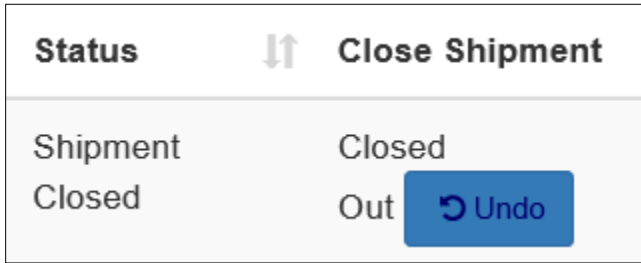
Step 10a. Click on the drop-down arrow to the right of the filter to expand the drop-down menu.



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

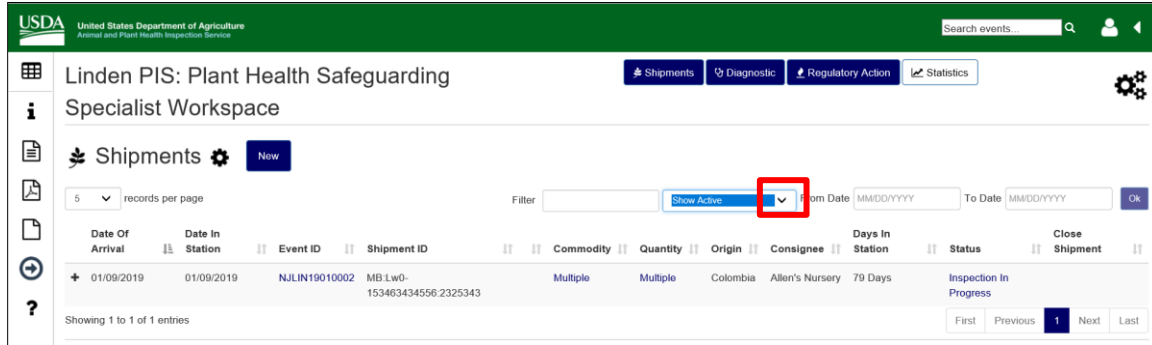
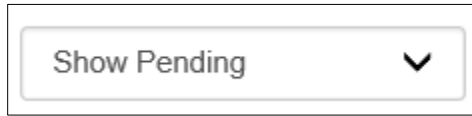
Overall Steps to undo a closed-out shipment

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

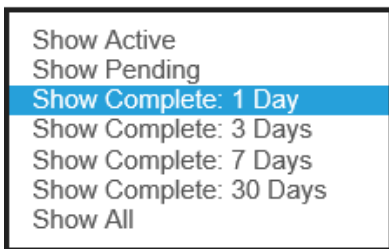
Step	Action
1	Change the filter above the Shipments panel on the Workspace to one of the “Show Complete” options (best choice, will display fewer results) or “Show All.”
2	Click the “Undo” button in the “Close Out” column at the far right. The shipment will disappear from the screen.
3	Change the view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

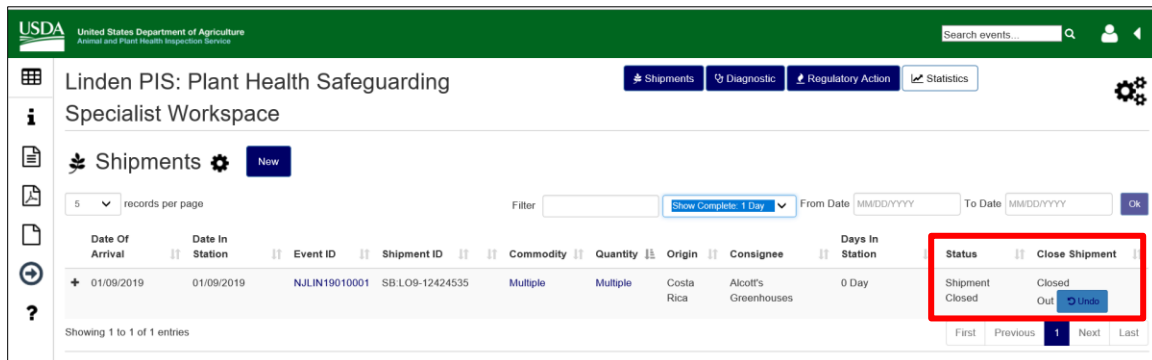
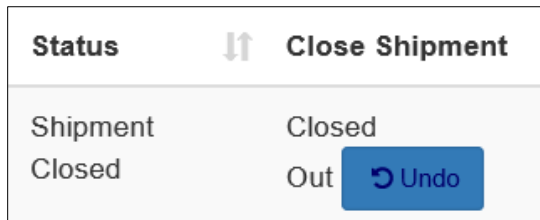
Step 1a. Click on the drop-down arrow to the right of the filter to expand the drop-down menu.



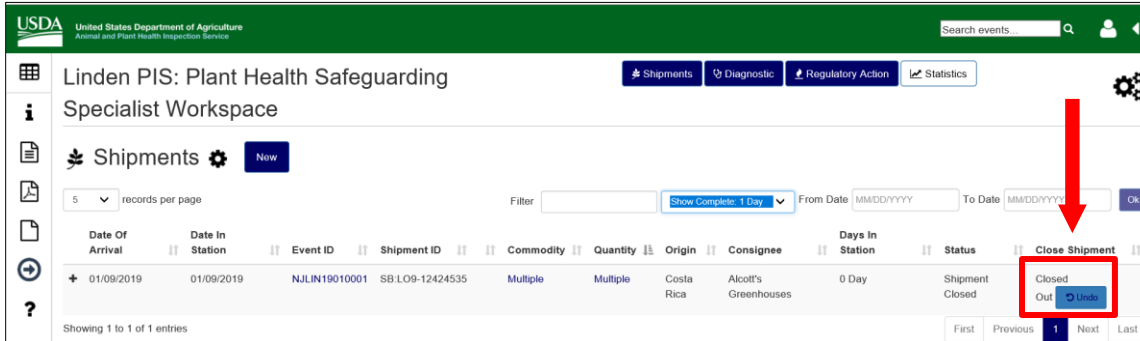
Step 1b. Make your selection.



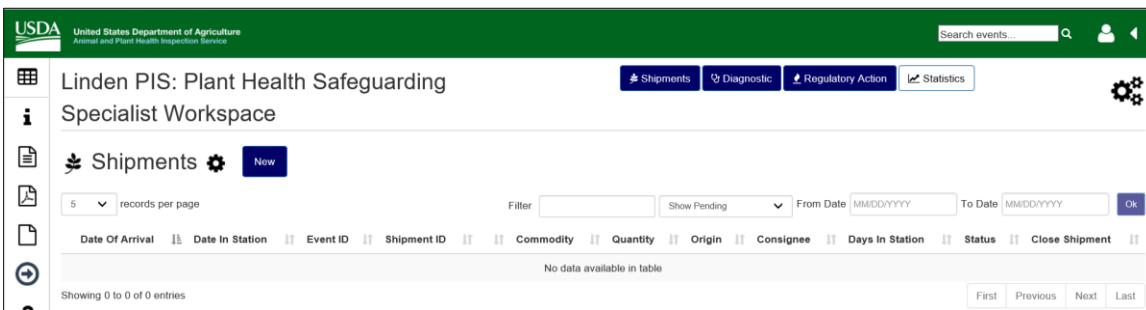
Your shipment will display with the Status “Shipment Closed” and under the “Close Out” column, it will display as “Closed Out” with an Undo button alongside.



Step 2: Click the “Undo” button.

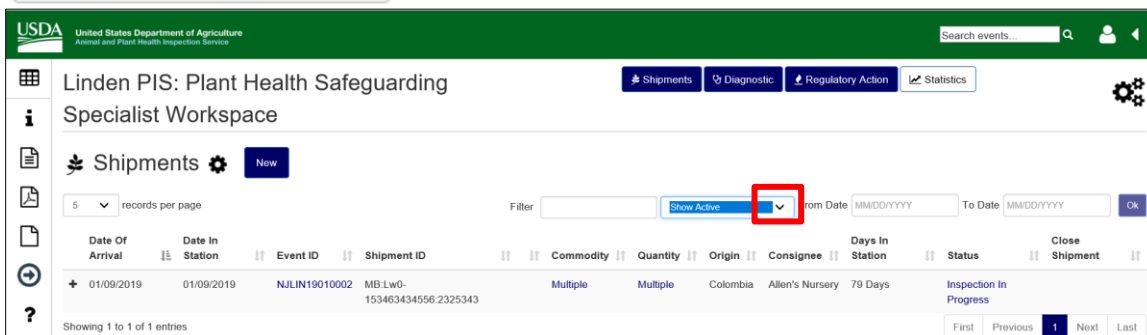


Your shipment will disappear from the screen:



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.

Show Active
Show Pending
Show Complete: 1 Day
Show Complete: 3 Days
Show Complete: 7 Days
Show Complete: 30 Days
Show All

The screenshot shows the USDA PHSS Specialist Workspace interface. The top navigation bar includes 'Shipments', 'Diagnostic', 'Regulatory Action', and 'Statistics'. The main content area displays a shipment record with the following details:

Date Of Arrival	Date In Station	Event ID	Shipment ID	Commodity	Quantity	Origin	Consignee	Days In Station	Status	Close Shipment
01/09/2019	01/09/2019	NJLIN19010002	MB.Lw0-153483434556.2325343	Multiple	Multiple	Colombia	Allon's Nursery	79 Days	Inspection In Progress	

The 'Show Active' dropdown menu is highlighted with a red arrow, indicating the selection process.

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

The screenshot shows the same USDA PHSS Specialist Workspace interface. The shipment record now displays the following details:

Date Of Arrival	Date In Station	Event ID	Shipment ID	Commodity	Quantity	Origin	Consignee	Days In Station	Status	Close Shipment
01/09/2019	01/09/2019	NJLIN19010001	SB.LO9-12424535	Multiple	Multiple	Costa Rica	Alcott's Greenhouses	0 Day	Pending Close Out	Close Out

The 'Pending Close Out' and 'Close Out' buttons are highlighted with a red box, indicating the next steps in the process.