



User Guide: Entering Data for Document Review Page in PIS ARM Workspace

Purpose: This user guide describes accessing and entering information in the Document Review Page. The following areas are covered in this user guide:

1. Access the Document Review page.
2. Enter Document Information
3. Update/Delete Document Information

1. Access the Document Review Page

There are two ways to access the Document Review page from the Inspection Information page after creating a record.



1. Click on the Breadcrumb link which is located on the top right side of the page

or.

2. Click on the Document Tab on the bottom right side of the page.

There are other ways to access the Document Review Page from the main workspace. Users can click on the status listed in the Status Column.

The screenshot shows the 'Orlando PIS: AQI / PIS PHSS Workspace' interface. At the top, there are tabs for 'Inspections', 'Inspections Diagnostic', and 'Regulatory Action'. Below the tabs, there is a 'New' button and a 'records per page' dropdown set to '5'. A table of inspection records is displayed with columns: Date Of Arrival, Date In Station, Pathway, Event ID, Shipment ID, Commodity, Quantity, Consignee, Origin, RBS Status, and Status. The 'Status' column has two entries: 'View Details' and 'Pending Doc Review', both of which are highlighted with red boxes. The table shows three records, with the first two having a '+' icon in the first column and the third having a '+' icon in the first column. The first record has a status of 'View Details' and the second has a status of 'Pending Doc Review'. The third record has a status of 'Pending RBS Decision'.

	Date Of Arrival	Date In Station	Pathway	Event ID	Shipment ID	Commodity	Quantity	Consignee	Origin	RBS Status	Status
+	12/13/2023	02/02/2024	Air Cargo	FLORL23120001	SB 001-78709554	Multiple	Multiple	Brad's Buds & Blooms	Multiple	Multiple	View Details
	01/31/2024	Pending	Air Cargo	FLORL24010001	SB ABC-12345678						Drill Commodity
+	03/07/2024	Pending	Air Cargo	FLORL24020001	SB 001-25897410	Lantana camera - Lantana camera (FM)	5000 Plant Units	Brad's Buds & Blooms	Guatemala	Pending RBS Decision	Pending Doc Review

When there are multiple commodities in a record; users will see “View Details” under the

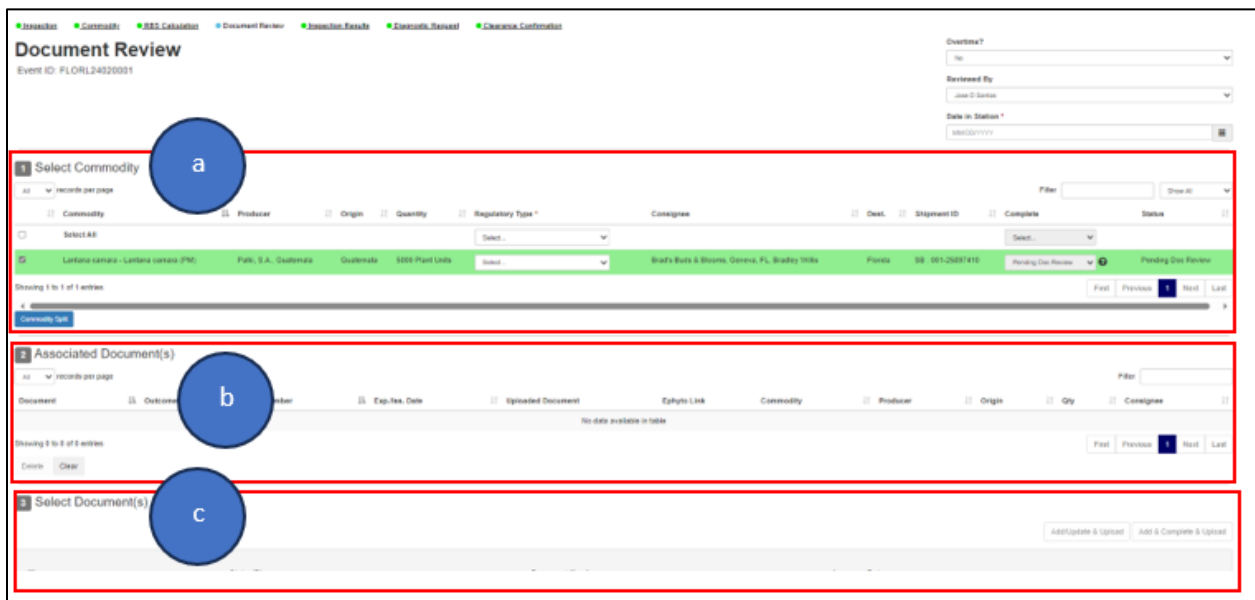


Status column . Click on “View Details”, then find the commodity(ies) with the “Pending Doc Review”, “Document Review in Progress”, or “Waiting for Documentation – Due MM/DD/YYYY” to access the Document Review Page.

2. Enter Document Information and Uploading files

This page consists of three Headings:

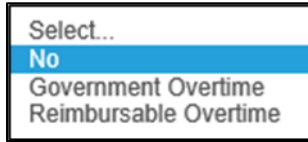
- a- Heading Number 1 - **1** Select Commodity
- b- Heading Number 2 - **2** Associated Document(s)
- c- Heading Number 3 - **3** Select Document(s)



The Document information will be entered on Heading Number 3. Once the information is added by the user, it will show on Heading Number 2.

Note:

All required fields will show a red asterisk. Users must enter information in these fields. The Document Review page begins with a new field: “Overtime?” This field will default to “No” but there are other options in the dropdown list.



A. Refer to the table below, to determine which option to select from the dropdown list.

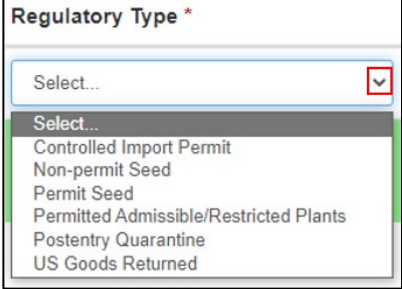

IF WORKING	THEN
Government overtime	Select Government Overtime
Reimbursable overtime	Select Reimbursable Overtime
No overtime	Leave the field as-is

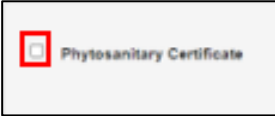



B. Reviewed By is defaulted to the user logged into ARM. **If needed**, for the “Reviewed By” field users can select any PHSS from their location.

C. Click on the Calendar Icon and select a date for the Date in Station.

Refer to the table below to learn how to enter Document information in the Document Review page:

STEP	ACTION
1	<p>Select the commodity(ies) under Heading 1 – Select Commodity.</p> <p>Note: If multiple commodities will have the same Document information; users can click the “Select All” checkbox. All commodities will be checked, avoiding checking commodities one by one.</p>

2	<p>Select a Regulatory Type from the drop-down list.</p> 
3	<p>Click on the Commodity Split, if needed.</p>  <p>Note: This only works for a single commodity at a time. Refer to the User Guide: Entering a Commodity Split in ARM.</p>

4A	Select a Document (s) on Heading 3 – Select Document(s).	
	IF ADDING A:	THEN:
	Phytosanitary Certificate	<ol style="list-style-type: none"> Select Phytosanitary Certificate.  <ol style="list-style-type: none"> Go to Step 4B.
	New Permits	<ol style="list-style-type: none"> Select a Permit.  <ol style="list-style-type: none"> Go to Step 4B.
	Permit already entered	<ol style="list-style-type: none"> Click Show Stored Permit(s).  <ol style="list-style-type: none"> Select the Permit. Go to Step 5.
	CITES Document	<ol style="list-style-type: none"> Select CITES Document.  <ol style="list-style-type: none"> Go to Step 4B.
	Seal	<ol style="list-style-type: none"> Select Seal. Enter the seal number. Go to Step 5.
	Other Shipment Documents	<ol style="list-style-type: none"> Select Other Shipment Documents Enter the Description. Go to Step 5.
Prohibited Commodity/Product	<ol style="list-style-type: none"> Select Prohibited Commodity/Product Go to Step 5. 	
<p>Note: If there are multiple documents associated with the same commodities, users can click the checkboxes to submit and link them together. All commodities will be checked, avoiding checking commodities one by one.</p>		

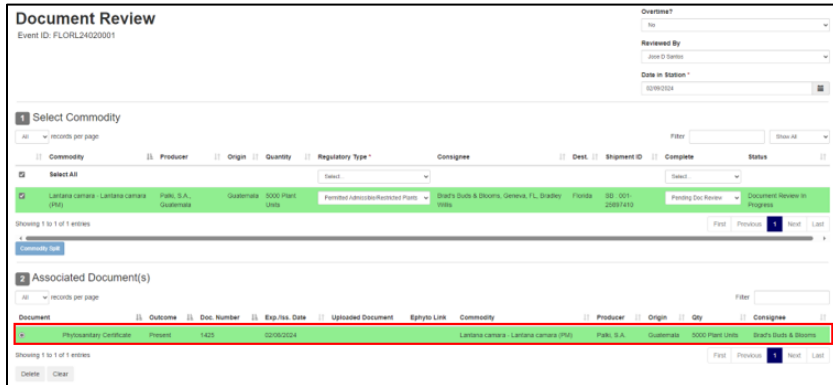
<p>4B</p>	<p>Select Status/Discrepancy.</p> <div data-bbox="298 285 1073 390" style="border: 1px solid gray; padding: 5px;"> <p>Status/Discrepancy</p> <p>Present ▼</p> </div> <p>Note: This field defaults to Present, but the user will be able to select the Status/Discrepancy that applies in the dropdown.</p>
<p>4C</p>	<p>Enter the Document Number.</p> <div data-bbox="298 600 1081 709" style="border: 1px solid gray; padding: 5px;"> <p>Document Number *</p> <div style="border: 1px solid red; height: 20px; width: 100%;"></div> </div> <p>Note: This field will be required most of the time but will depend on the Status/Discrepancy selected in the previous step.</p>
<p>4D</p>	<p>Click on the Calendar Icon to Select an Issuance/Expiration Date.</p> <div data-bbox="298 924 717 1024" style="border: 1px solid gray; padding: 5px;"> <p>Issuance Date *</p> <p>MM/DD/YYYY 📅</p> </div> <p>Or</p> <div data-bbox="298 1075 721 1171" style="border: 1px solid gray; padding: 5px;"> <p>Expiration Date</p> <p>MM/DD/YYYY 📅</p> </div>
<p>4E</p>	<p>Select a COE Treatment Schedule, SKIP this step if needed.</p> <div data-bbox="298 1293 623 1402" style="border: 1px solid gray; padding: 5px;"> <p>COE Treatment Schedule</p> <p>Not Selected ▼</p> </div> <p>Note: This field will only be available if the user selects Present – COE Treatment Required in the Status/Discrepancy for the Permit.</p> <div data-bbox="298 1575 1227 1680" style="border: 1px solid gray; padding: 5px;"> <p><input checked="" type="checkbox"/> Permit</p> <div style="float: right; border: 1px solid gray; padding: 2px;"> <p>Status/Discrepancy</p> <p>Present - COE Treatment Required ▼</p> </div> </div>

4F	<p>For the Postentry Quarantine Permit, enter the Approved Growing Site, SKIP this step if needed.</p> <div data-bbox="298 327 954 457"> <p>Approved Growing Site</p> <input type="text"/> </div>						
4G	<p>Upload files, SKIP this step if needed.</p> <div data-bbox="298 562 529 655"> </div> <p>Note: To upload files, refer to the User Guide: How to Upload Digital Imagery and/or Supports Documents on a Diagnostic Determination. This is a non-required field.</p>						
5	<p>Adding and completing documents.</p> <table border="1" data-bbox="293 869 1386 1472"> <thead> <tr> <th data-bbox="293 869 732 932">IF:</th> <th data-bbox="732 869 1386 932">THEN:</th> </tr> </thead> <tbody> <tr> <td data-bbox="293 932 732 1226">Done entering documents</td> <td data-bbox="732 932 1386 1226"> <p>Click Add & Complete & Upload</p> <div data-bbox="743 1010 1166 1079"> <input type="button" value="Add/Update & Upload"/> <input type="button" value="Add & Complete & Upload"/> </div> <p>Note: After clicking Add & Complete & Upload, will complete the Document Review.</p> </td> </tr> <tr> <td data-bbox="293 1226 732 1472">Need to enter more documents</td> <td data-bbox="732 1226 1386 1472"> <p>Click Add/Update & Upload</p> <div data-bbox="743 1352 1312 1436"> <input type="button" value="Add/Update & Upload"/> <input type="button" value="Add & Complete & Upload"/> </div> </td> </tr> </tbody> </table>	IF:	THEN:	Done entering documents	<p>Click Add & Complete & Upload</p> <div data-bbox="743 1010 1166 1079"> <input type="button" value="Add/Update & Upload"/> <input type="button" value="Add & Complete & Upload"/> </div> <p>Note: After clicking Add & Complete & Upload, will complete the Document Review.</p>	Need to enter more documents	<p>Click Add/Update & Upload</p> <div data-bbox="743 1352 1312 1436"> <input type="button" value="Add/Update & Upload"/> <input type="button" value="Add & Complete & Upload"/> </div>
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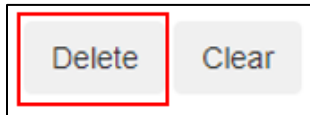
Note: After one commodity is added, most of the fields will remain with the values previously entered. If users need to add more commodities, update the fields as needed, and click on “Add Commodity”.

3. Update/Delete Document Information

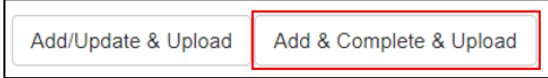
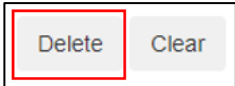
Once a Document has been added and appears under the Associated Document(s) Table, users can update or delete the associated document(s) if needed. When users click on the document, the row will turn green and two additional tabs will show on the screen.



Users will have the option of updating or deleting document(s) associated with the commodity(ies).



Refer to the table below to update or delete a document already entered:

IF:	THEN:
Updating a Document	<ol style="list-style-type: none"> 1. Click on the Document under Heading Number 2 – Associated Document(s). 2. Select the Document. 3. Review information and update fields. 4. Click on Add & Complete & Upload. 
Deleting a Document	<ol style="list-style-type: none"> 1. Click on the Document on Heading Number 2 – Associated Document(s). 2. Select the Document. 3. Click on Delete. 

Note: After following the steps above, if you still having issues updating or deleting a document information, please contact the ARM Help Desk for guidance.