User Guide: PHSS Predeparture Mail Inspection

Purpose: This user guide describes how to enter a Predeparture Mail inspection in ARM with:
- No findings
- A Regulatory Action/PPQ 287
- A Diagnostic Request

Enter a Predeparture Mail Inspection with No Findings

Follow these steps to enter a Predeparture Mail Inspection with no findings. The general steps include:
1. Access Predeparture Mail Inspections Page
2. Add Inspection Information
3. Add Article Information
4. Complete Document Review
5. Add Inspection Results

1. Access Predeparture Mail Inspections Page

Step	Action
1	Scroll down to the "Predeparture Mail Inspections" pane on the workspace.
2	Click "New" to the right of the "Predeparture Mail Inspections" heading. The Predeparture Mail Inspections page displays.

2. Add Inspection Information

Step	Action
1	Complete the required fields. NOTE: • Pathway defaults to Predeparture Mail. • Click the "Commercial Shipment" checkbox, if applicable.
2	Click Save.

3. Add Article Information

Step	Action
1	Click the "Commodity" breadcrumb at the top of the page or the "Commodity" button at the bottom right. The "Commodity" page displays.
2	Scroll down to Heading 2 "Add Commodities." NOTE: This page begins with Heading 1 "Commodities Master Table." Your Commodities display in the master table after you enter them in Heading 2.
3	Complete required fields.
4	Click the "Add" button. Your Commodity displays in Heading 1, "Commodities Master Table."
5	Repeat steps 1-4 for other Commodities, if applicable. NOTE: For each Commodity to record in ARM, you must click "Add Commodity."

4. Complete Document Review

Step	Action
1	Click the "Document Review" breadcrumb or the "Document Review" button on the bottom right.
2	Review the data in the "Overtime?" Field. NOTE: The Regular/Overtime field defaults to "No." If you are working some type of overtime, use the following to determine how to proceed: <table><tr><td>**If you are:**</td><td>**Then:**</td></tr><tr><td>Working government overtime</td><td>1. Select Government Overtime 2. Proceed to next step.</td></tr><tr><td>Working reimbursable overtime</td><td>1. Select Reimbursable Overtime in the Regular/Overtime drop-down menu. 2. Proceed to next step.</td></tr><tr><td>**Not** working overtime</td><td>Leave the field as-is and proceed to next step.</td></tr></table>
3	Enter the Inspector in the "Reviewed By" field and Inspection Date in the Date in Station field in the upper right of the page
4	In Section 1, select all commodities.
5	Scroll down to Section 4, and select the checkbox next to "Predeparture-Not Required" document type
6	Click on the "Add & Complete & Upload" button at the top of Section 3.

5. Add Inspection Results

Step	Action
1	Go to the "Inspection Results" page after adding all the Commodities by: • Clicking the "Inspection Results" breadcrumb at the top of the page, or • Clicking the "Inspection Results" button in the lower left corner of the page.
2	Review the data in the "Overtime?" Field. NOTE: The Regular/Overtime field defaults to "No." If you are working some type of overtime, use the following to determine how to proceed: <table><tr><th>If you are:</th><th>Then:</th></tr><tr><td>Working government overtime</td><td>3. Select Government Overtime 4. Proceed to next step.</td></tr><tr><td>Working reimbursable overtime</td><td>3. Select Reimbursable Overtime in the Regular/Overtime drop-down menu. 4. Proceed to next step.</td></tr><tr><td>**Not** working overtime</td><td>Leave the field as-is and proceed to next step.</td></tr></table>
3	Complete the required fields. NOTE: • ARM will not allow you to complete the inspection without "Inspection Date" field filled in. • In Heading 1 "Select Inspection Type," the Commodity tab is black. That means ARM is automatically ready for you to enter the results of your Mail inspection.
4	Scroll down to Heading 2 "Select Commodity." You will see the Commodity(s) you entered on the Commodity page.
5	Select the Commodity(s) for inspection results recording. NOTE: In ARM, you can record the results for multiple Commodities if they have the same findings. <table><tr><th>If you found:</th><th>Then:</th></tr><tr><td>The same results for all Commodities</td><td>Click on the "Select All" button at the top of the section.</td></tr><tr><td>Different results for one or more Commodities</td><td>Click on the checkbox(es) to the left of the Commodity(s).</td></tr></table>

Step	Action
6	Complete the required fields from left to right on the row, beginning with "Qty." NOTE: Fields you completed on the previous page will have been filled in by ARM automatically.
7	Repeat steps 5 and 6 for each Commodity if the Commodities have different findings.
8	Click "Save" in the lower left corner when you have completed section 2.
9	Scroll up and click the Commodity(s) in section 2 that have the same inspection results. The rows will turn green.
10	Scroll down to Heading 3 "Select Inspection Outcome."
11	Click the "No Findings" checkbox in the "No Action" column.
12	Click on the "Add/Update" button at the lower left of the section.
13	Scroll down to Heading 5 "Outcomes." You will see your Commodity(s) under the "Outcome" column.
14	Click the drop-down arrow under the "Complete" column and select "Inspection Completed" if your inspection is completed.
15	Click the Workspace icon to return to the workspace, where your inspection will appear under the "Predeparture Mail Inspections" pane with the status "Closed." NOTE: To view your inspection, the view filter must be set to one of the "Show Complete" options or to "Show All."

Enter a Predeparture Mail Inspection with a Diagnostic Request

Follow these steps to enter a Predeparture Mail Inspection with a diagnostic request. The general steps include:
1. Access Predeparture Mail Inspections Page
2. Add Inspection Information
3. Add Article Information
4. Complete Document Review
5. Add Inspection Results
6. Enter Diagnostic Request Information
7. Verify and Print Specimen Routing Form, Close Inspection

1. Access Predeparture Mail Inspections Page

Step	Action
1	Follow the same steps to Access Predeparture Mail Inspections Page as described in Enter a Predeparture Mail Inspection with No Findings (above).

2. Add Inspection Information

Step	Action
1	Follow the same steps to Add Inspection Information as described in Enter a Predeparture Mail Inspection with No Findings (above).

3. Add Article Information

Step	Action
1	Follow the same steps to Add Article Information as described in Enter a Predeparture Mail Inspection with No Findings (above).

4. Complete Document Review

Step	Action
1	Click the "Document Review" breadcrumb or the "Document Review" button on the bottom right.
2	Review the data in the "Overtime?" Field. NOTE: The Regular/Overtime field defaults to "No." If you are working some type of overtime, use the following to determine how to proceed: <table><tr><td>**If you are:**</td><td>**Then:**</td></tr><tr><td>Working government overtime</td><td>5. Select Government Overtime 6. Proceed to next step.</td></tr><tr><td>Working reimbursable overtime</td><td>5. Select Reimbursable Overtime in the Regular/Overtime drop-down menu. 6. Proceed to next step.</td></tr><tr><td>**Not** working overtime</td><td>Leave the field as-is and proceed to next step.</td></tr></table>
3	Enter the Inspector in the "Reviewed By" field and Inspection Date in the Date in Station field in the upper right of the page
4	In Section 1, select all commodities.
5	Scroll down to Section 4, and select the checkbox next to "Predeparture-Not Required" document type
6	Click on the "Add & Complete & Upload" button at the top of Section 3.

5. Add Inspection Results

Step	Action
1	Go to the "Inspection Results" page after adding all the Commodities by: • Clicking the "Inspection Results" breadcrumb at the top of the page, or • Clicking the "Inspection Results" button in the lower left corner of the page.
2	Review the data in the "Overtime?" Field. NOTE: The Regular/Overtime field defaults to "No." If you are working some type of overtime, use the following to determine how to proceed:
3	Complete the required fields. NOTE: • ARM will not allow you to complete the inspection without "Inspection Date" field filled in.
4	Scroll down to Heading 1 "Select Inspection Type." NOTE: The Commodity tab is black. This means ARM is automatically ready for you to enter your information.
5	Scroll down to Heading 2 "Select Commodity." You will see the Commodity(s) you entered on the Commodity page.

Within Step 2:

If you are:	Then:
Working government overtime	7. Select Government Overtime 8. Proceed to next step.
Working reimbursable overtime	7. Select Reimbursable Overtime in the Regular/Overtime drop-down menu. 8. Proceed to next step.
Not working overtime	Leave the field as-is and proceed to next step.

Step	Action
6	Select the Commodity(s) for inspection results recording. NOTE: In ARM, you can record the results for multiple Commodities if they have the same findings. <table><tr><td>**If the inspection outcome is:**</td><td>**Then:**</td></tr><tr><td>The same for each Commodity</td><td>1. Click "Select All" at the top of the section. 2. Complete the required fields from left to right on the row, beginning with "Qty." NOTE: Some fields automatically populate based on selections on the previous page. 3. Proceed to next step.</td></tr><tr><td>**Not** the same for each Commodity</td><td>1. Click the checkbox to the left of the Article. 2. Complete the required fields from left to right on the row, beginning with "Qty." NOTE: Some fields automatically populate based on selections on the previous page. 3. Repeat steps 1 and 2 until all inspection results are entered for each article. 4. Proceed to next step.</td></tr></table>
7	Click the "Inspected By" drop-down arrow and select the correct name. NOTE: Fields you completed on the previous page will have been filled in by ARM automatically.
8	Click "Save" in the lower left corner.
9	Scroll down to Heading 3 "Select Inspection Outcome."

Step	Action
10	Use the following to determine how to proceed. NOTE: - If you select "Pest," all Commodities will become available in the "Pending Outcomes" section for selection to create Diagnostic Requests. - Commodities may require both a Diagnostic Request and a Regulatory Action. See the scenario below for Regulatory Action for guidance.

If the Commodity requires:	Then:
Diagnostic Request	1. Select a checkbox in the column under "Diagnostic Request Required. 2. Proceed to steps 11–13.
Diagnostic Request plus Regulatory Action	Diagnostic Request 1. Select a checkbox in the column under "Diagnostic Request Required." 2. Proceed to steps 11–13 below. Regulatory Action 1. Select a checkbox in the column under "Regulatory Action Required." 2. Scroll down to Heading 5 "Outcomes." Click on the checkbox to the left of the Commodity that needs the Regulatory Action. 3. Click the drop-down arrow under the "Complete" field and select "Inspection Completed." 4. Click the Workspace icon to return to the workspace. 5. Scroll down to the "Create 287" link, which you will find in the Status column in either of two panes: • Predeparture Mail Inspections • Predeparture 287 6. Access the User Guide: Predeparture PPQ 287 Issuance and continue with steps in the user guide.

Step	Action
11	Click "Add/Update" at the lower left of the section.

Step	Action
12	Use the following to determine how to proceed. | **If other Commodities:**	**Then:** | |---|---| | Need a Diagnostic Request | 1. Repeat steps 11–13 for each Commodity. 2. Proceed to next step. | | Do **not** need a Diagnostic Request | Proceed to next step. |
12	Scroll down to Heading 5 "Outcomes."
13	Click the Commodity (ies) that require a Diagnostic Request. NOTE: • You can click on multiple checkboxes and create multiple diagnostic requests at the same time. • The "Inspection Complete" field is grayed out. A commodity with a Diagnostic Request Required outcome cannot be marked "Inspection Complete" until there is a minimum of one submitted Diagnostic Request with the commodity as the host.
14	Proceed to 5. Enter Diagnostic Request Information.

6. Enter Diagnostic Request Information

Step	Action
1	Go to the Diagnostic Request page by either: • Clicking the "Diagnostic Request" button at the lower right, or • Clicking the "Diagnostic Request" breadcrumb link at the top of the page.
2	Scroll down to the "Select Host" Heading. Article(s) display in the table.
3	Click the checkbox(es) to the left of the article in the "Select Host" table for the Diagnostic Request(s) being created.
4	In Select Host subsection, complete the required field, "Host Proximity." NOTE: The "Inspection Complete" field is grayed out. A commodity with a Diagnostic Request Required outcome cannot be marked "Inspection Complete" until there is a minimum of one submitted Diagnostic Request with the commodity as the host.
5	Complete all required fields.
6	Scroll down to the "Select Pest/Pest Discipline" Heading.

Step	Action
7	Use the following to determine how to proceed.

If you are going to:	Then:
Identify a pest taxonomy	1. Search for Pest Name. 2. Select Pest. 3. Proceed to next step. NOTE: The subsequent fields will change, depending on the choice.
Route specimen to a Discipline	1. Select Discipline. 2. Proceed to next step. NOTE: The subsequent fields will change, depending on the choice.

Step	Action
8	Complete all required fields, including Pest Stages, if applicable, and any other more specific information you can provide.
9	Click "Add" at the bottom left of the Select Pest/Pest Discipline subsection. The Diagnostic Request displays in the subheading below with the status "Draft Diagnostic Request."
10	Review the data for your Diagnostic Request(s).
11	Use the following to determine how to proceed.

If you want to:	Then:
Update	1. Select the radial button next to the DR #. 2. Scroll down to the Select Pest/Pest Discipline subsection. 3. Make changes as needed. 4. Click Update. 5. Proceed to next step.
Delete	1. Select the radial button next to the DR #. 2. Scroll down to the Select Pest/Pest Discipline subsection. 3. Click Delete. 4. Proceed to next step.
Neither update **nor** delete	Proceed to next step.

Step	Action
12	Click "Submit DR" at the lower right. The status of the Diagnostic Request changes to "AI Pending Specimen Receipt" in the table.

Step	Action
13	Use the following to determine how to proceed.

	If you are:	Then:

	Printing the Specimen Routing Form to give to the Area Identifier with the interception	1. Click the "AI Pending Specimen Receipt" hyperlink.
		    a. You can also find the link to the PDF of the form on the Info Page located in the left-hand drawer of every ARM page.
		    b. You can also find the link to the PDF of the form on the ARM-generated forms page in the left-hand drawer of every ARM page.
		2. Proceed to next step.

	Not printing the Specimen Routing Form	Proceed to next step.

Step	Action
14	Click "Inspection Completed" in "Complete" column.
15	Click the Workspace icon to return to the workspace. The inspection displays under the "Predeparture Mail Inspections" pane with the status "AI Pending Specimen Receipt."

7. Verify and Print Specimen Routing Form, Close Inspection

Step	Action
1	Scroll down to section 5, Diagnostic Requests.
2	Find the Diagnostic Request.
3	Click the "AI Pending Specimen Receipt" hyperlink to review Specimen Routing Form, which displays as a PDF. NOTE: • You can also find the link to the PDF of the form on the Info Page located in the left-hand drawer of every ARM page. • You can also find the link to the PDF of the form on the ARM-generated forms page in the left-hand drawer of every ARM page.
4	Click the printer icon at the bottom of the PDF.
5	Print the Specimen Routing Form for attachment to the specimen for routing to the Area Identifier.
6	Close the Specimen Routing Form screen.
7	Click "Inspection Completed" in "Complete" column.

Step	Action
8	Click the Workspace icon to return to the workspace. The inspection displays under the "Predeparture Mail Inspections" pane with the status "Diagnostics in Progress." NOTE: • The Diagnostic Request will now have the status of "AI Pending Specimen Receipt. • A Predeparture Mail Inspection Diagnostic Request will receive a Quarantine Recommendation and if the pest is actionable, this will lead to a PPQ 287.

Enter a Predeparture Mail Inspection with a Regulatory Action/PPQ 287

Follow these steps to enter a Predeparture Mail Inspection that requires regulatory action. The general steps include:
1. Access Predeparture Mail Inspections Page
2. Add Inspection Information
3. Add Article Information
4. Complete Document Review
5. Add Inspection Results

1. Access Predeparture Mail Inspections Page

Step	Action
1	Follow the same steps to Access Predeparture Mail Inspections Page as described in Enter a Predeparture Mail Inspection with No Findings (above).

2. Add Inspection Information

Step	Action
1	Follow the same steps to Add Inspection Information as described in Enter a Predeparture Mail Inspection with No Findings (above).

3. Add Article Information

Step	Action
1	Follow the same steps to Add Article Information as described in Enter a Predeparture Mail Inspection with No Findings (above).

4. Complete Document Review

Step	Action
1	Click the "Document Review" breadcrumb or the "Document Review" button on the bottom right.
2	Review the data in the "Overtime?" Field. NOTE: The Regular/Overtime field defaults to "No." If you are working some type of overtime, use the following to determine how to proceed: <table><tr><th>If you are:</th><th>Then:</th></tr><tr><td>Working government overtime</td><td>9. Select Government Overtime 10. Proceed to next step.</td></tr><tr><td>Working reimbursable overtime</td><td>9. Select Reimbursable Overtime in the Regular/Overtime drop-down menu. 10. Proceed to next step.</td></tr><tr><td>**Not** working overtime</td><td>Leave the field as-is and proceed to next step.</td></tr></table>
3	Enter the Inspector in the "Reviewed By" field and Inspection Date in the Date in Station field in the upper right of the page
4	In Section 1, select all commodities.
5	Scroll down to Section 4, and select the checkbox next to "Predeparture-Not Required" document type
6	Click on the "Add & Complete & Upload" button at the top of Section 3.

5. Add Inspection Results

Step	Action
1	Go to the "Inspection Results" page after adding all the Commodities by: • Clicking the "Inspection Results" breadcrumb at the top of the page, or • Clicking the "Inspection Results" button in the lower left corner of the page.

Step	Action
2	Review the data in the "Overtime?" Field. NOTE: The Regular/Overtime field defaults to "No." If you are working some type of overtime, use the following to determine how to proceed: <table><tr><td>**If you are:**</td><td>**Then:**</td></tr><tr><td>Working government overtime</td><td>11. Select Government Overtime 12. Proceed to next step.</td></tr><tr><td>Working reimbursable overtime</td><td>11. Select Reimbursable Overtime in the Regular/Overtime drop-down menu. 12. Proceed to next step.</td></tr><tr><td>**Not** working overtime</td><td>Leave the field as-is and proceed to next step.</td></tr></table>
3	Complete the required fields. NOTE: ARM will not allow you to complete the inspection without "Inspection Date" field filled in.
4	Scroll down to Heading 1 "Select Inspection Type." NOTE: The Commodity tab is black. This means ARM is automatically ready for you to enter your information.
5	Scroll down to Heading 2 "Select Commodity." You will see the Commodity(s) you entered on the Commodity page.
6	Select the Commodity(s) for inspection results recording. NOTE: In ARM, you can record the results for multiple Commodities if they have the same findings. <table><tr><td>**If you found:**</td><td>**Then:**</td></tr><tr><td>The same results for all Commodities</td><td>Click on the "Select All" button at the top of the section.</td></tr><tr><td>Different results for one or more Commodities</td><td>Click on the checkbox(es) to the left of the Commodity(s).</td></tr></table>
7	Click the "Inspected By" drop-down arrow and select the correct name. NOTE: Fields you completed on the previous page will have been filled in by ARM automatically.

Step	Action
8	Click "Save" in the lower left corner.
9	Scroll down to Heading 3 "Select Inspection Outcome."
10	Click a checkbox under the "Regulatory Action Required" heading.
11	Click "Add/Update" at the lower left of the section.
12	Scroll down to Heading 5 "Outcomes." Click on the checkbox to the left of the Commodity that needs the Regulatory Action.
13	Click the drop-down arrow under the "Complete" field and select "Inspection Completed."
14	Click the Workspace icon to return to the workspace.
15	Scroll down to the "Create 287" link, which you will find in the Status column in either of two panes: • Predeparture Mail Inspections • Predeparture 287
16	Access the User Guide: Predeparture PPQ 287 Issuance and continue with steps in the user guide.