

Taxonomic Support for Surveys

Updated 6/25/2025

Background

The National Identification Services (NIS) coordinates the identification of plant pests in support of USDA's regulatory programs. Accurate and timely identifications provide the foundation for quarantine action decisions and are essential in the effort to safeguard the nation's agricultural and natural resources.

NIS employs and collaborates with scientists who specialize in various plant pest groups, including weeds, nematodes, insects, mites, mollusks and plant diseases. These scientists are stationed at a variety of institutions around the country, including federal research laboratories, plant inspection stations, land-grant universities, and natural history museums. Additionally, the PPQ CPHST Beltsville Laboratory is responsible for providing national confirmations of plant pathogens through molecular testing using approved assays and sequencing in support of the agency's pest monitoring programs.

On June 13, 2007, the PPQ Deputy Administrator issued PPQ Policy No. PPQ-DA-2007-02 which established the role of PPQ NIS as the point of contact for all domestically-detected, introduced plant pest confirmations. A Domestic Diagnostics Coordinator (DDC) position was established to administer the policy and coordinate domestic diagnostic needs for NIS. In 2024, PPQ Emergency and Domestic Programs (EDP) assumed the lead for communications of confirmatory identification (ID) results. Currently, NIS and EDP split responsibility of coordinating domestic samples submitted for confirmation, and communicating the results to the submitters. Any questions regarding sample routing to DDC centralized email inbox at ppq.domestic.diagnostic.coordinator@aphis.usda.gov. Any questions regarding communication of results can be directed , EDP Domestic Notifications and Confirmatory Results (DNCR) centralized email inbox at PPQ.EDP.DNCR@usda.gov.

Taxonomic Support and Survey Activity

Taxonomic support for pest surveillance is basic to conducting quality surveys. A misidentification or incorrectly screened target pest can mean a missed opportunity for early detection when control strategies would be more viable and cost effective. The importance of good sorting, screening, and identifications in our domestic survey activity cannot be overemphasized.

Fortunately, most states have, or have access to, good taxonomic support within their state. Taxonomic support should be accounted for in cooperative agreements as a cost of conducting surveys. Taxonomists and laboratories within the state often may require supplies, develop training materials, or need to hire technicians to meet the needs of screening and identification. Moreover, when considering whether to survey for a particular pest a given year, it is advisable to consider the challenges of taxonomic support as a factor in choosing that as a survey target in the first place.

Sorting and Screening

For survey activity, samples that are properly sorted and screened prior to being examined by an identifier will result in quicker turn-around times for identification.

Sorting is the first level of activity that assures samples submitted are of the correct target group of pests being surveyed, i.e., after removal of debris, ensure that the correct order, or in some cases family, of insects is submitted. For plant disease survey samples, select those that are symptomatic if appropriate. There should be a minimum level of sorting expected of surveyors depending on the target group, training, experience, or demonstrated ability.

Screening is a higher level of discrimination of samples such that the suspect target pests are separated from the known non-target, or native species of similar taxa. For example, only the suspect target species or those that appear similar to the target species are forwarded to an identifier for confirmation. There can be first level screening and second level depending on the difficulty and complexity of the group. Again, the degree of screening appropriate is dependent on the target group, training, experience, and demonstrated ability of the screener.

Check individual survey protocols to determine if samples should be sorted, screened, or sent entire (raw) before submitting for identification. If not specified in the protocol, assume that samples should be sorted at some level.

Resources for Sorting, Screening, and Identification

Sorting, screening, and identification resources and aids useful to CAPS and PPQ surveys are best developed by taxonomists who are knowledgeable of the taxa. This includes the target pests and the established or native organisms in the same group that are likely to be in samples, and can be confused with the target. Many times these aids can be regionally based. They can be in the form of dichotomous keys, picture guides, or reference collections. NIS encourages the development of these resources, and when aids are complete, posting them on the CAPS website so others can benefit. If local screening aids are developed, please notify Lisa Jackson, PPQ National Operations Manager, as to their availability. Please see the following link for survey screening aids currently available at [CAPS Screening Aids](#).

Identification: The Domestic Area Identifier should be contacted prior to forwarding samples. It is helpful to know how many samples are being forwarded and when the samples will be shipped.

To submit the sample(s) to APHIS, complete and include one [PPQ Form 391](#) (705.18 KB) for each specimen in every set of collection data—that is, for each combination of locality, date, and collector.

Clearly label each specimen so it can easily be matched with the corresponding [PPQ Form 391](#) (705.18 KB). APHIS recommends using collection numbers for each specimen to do this.

In the remarks section of [PPQ Form 391](#) (705.18 KB), include an explanation of why these specimens need to be identified. For example, will the species, if confirmed, be a new State record or a new record for the

continental United States? Is confirmation needed to authorize Federal or State action?

Information from your PPQ Form 391 must be entered into the Agricultural Risk Management (ARM) system to initiate a diagnostic request. Contact the State Plant Health Director for the state in which the specimen was collected for assistance with this step. A directory of State Plant Health Director contacts can be found [here](#). A Diagnostic Record Routing Receipt generated by the ARM system must accompany any specimens sent to PPQ for confirmatory identification. The Diagnostic Routing Receipt provides the name and address of the laboratory providing confirmation services.

When sending in multiple printed forms, be sure to tightly collate each form with its corresponding specimen(s). Do not send a stack of forms and multiple containers that cannot be matched.

Other Entities for Taxonomic Assistance in Surveys

When taxonomic support within a state is not adequate for a particular survey, in some cases other entities may assist including PPQ identifiers, universities and state departments of agriculture in other states, and independent institutions. Check with the PPQ CAPS National Operations Manager (NOM) about the availability of taxonomic assistance.

Universities and State Departments of Agriculture: Depending on the taxonomic group, there are a few cases where these two entities are interested in receiving samples from other states. Arrangements for payment, if required for these taxonomic services, can be made through cooperative agreements. The National Plant Diagnostic Network (NPDN) also has several regional hub laboratories that can provide service identifications of plant diseases in their respective regions. PPQ currently has arrangements with two state

Departments of Agriculture (Oregon and Washington) and one university (Mississippi State University) through Farm Bill funding to provide taxonomic services to other states should they desire it. Contact your CAPS NOM for more information.

Independent Institutions: the Raleigh PPQ Field Operations office has set up multi-state arrangements for the Carnegie Museum of Natural History to identify insects from trap samples. They prefer to receive unscreened material and work on a fee basis per sample. Part of their payment is the right to keep the sample by-catch.

PPQ Port Identifiers: There are over 100 identifiers in PPQ that are stationed at ports of entry who primarily identify pests encountered in international commerce including conveyances, imported cargo, passenger baggage, and propagative material. In some cases, these identifiers process survey samples generated in PPQ conducted surveys, and occasionally from CAPS surveys. Some port identifiers have wider geographical areas they are responsible for than just the ports of entry so can be used to channel suspect CAPS target detections for forwarding. They also can convert a PPQ Form 391 into an electronic IBP record in Pest ID for suspect CAPS targets or other suspect new pests prior to them being forwarded for confirmation by an NIS recognized authority. The list of PPQ port identifiers and their areas of coverage is found [here](#).

PPQ Domestic Identifiers: PPQ also has a limited number of domestic identifiers (three entomologists and a plant pathologist) normally stationed at universities who are primarily responsible for survey samples. Domestic identifiers can handle unscreened or partially screened samples, with prior arrangement through the PPQ CAPS NOM. They also can act as an alternative intermediary for sending an unknown suspect to, for example, the ARS Systematic Entomology Lab (SEL), depending on their specialty and area of coverage. They also can enter into our Pest ID database the PPQ form 391 for suspect CAPS target or other suspect new pests, prior to being forwarded for confirmation by an NIS recognized authority.

PPQ Domestic Identifiers

<p>Bobby Brown Domestic Entomology Identifier</p> <p>USDA, APHIS, PPQ 901 W. State Street Smith Hall, Purdue University West Lafayette, IN 47907-2089</p> <p>Phone: 765-496-9673 Fax: 765-494-0420 e-mail: robert.c.brown@aphis.usda.gov</p> <p><u>Area of Coverage:</u> Primarily Northeast and Midwest U.S.</p>	<p>Xanthe Shirley Domestic Entomology Identifier</p> <p>412 Minnie Belle Heep 2475 TAMU College Station, TX 77843-2475</p> <p>Phone: 979-450-5492 e-mail: xanthe.shirley@gmail.com</p> <p><u>Specialty:</u> Hymenoptera</p> <p><u>Area of Coverage:</u> Primarily Western/Southern U.S.</p>
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<p>Joshua Jones Domestic Entomology Identifier</p> <p>USDA, APHIS, PPQ 924 Kenner Ave. #11 Kenner, LA 70062</p> <p>Phone: 504-461-4230 e-mail: Joshua.Jones@usda.gov</p> <p><u>Specialty:</u> Cicadellidae: Ledrinae, some Lepidoptera larvae.</p> <p><u>Area of Coverage:</u> Northern, Central, and Southern Midwest U.S.</p>	<p>Katherine Bella Domestic Plant Pathology Identifier</p> <p>USDA, APHIS, PPQ Department of Plant Pathology Kansas State University 4024 Throckmorton Plant Sciences Manhattan, KS 66506-5502</p> <p>Office (785) 532-1384 e-mail: Katherine.Bella@usda.gov</p> <p><u>Specialty:</u> Molecular diagnostics (citrus, <i>P. ramorum</i>, phytoplasmas), cyst nematode screening</p> <p><u>Area of Coverage:</u> primarily western U.S.</p>
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ATTENTION SAMPLE SUBMITTERS: When sending domestic samples to domestic identifiers, it is required that you notify them first by e-mail or phone that you plan to send samples, describing what kind, and how many. Then once sent, forward an e-mail to them with a tracking number for the express carrier that the samples were forwarded. If you plan to send a domestic sample to a national specialist, notify the CAPS NOM or the National Domestic Diagnostics Coordinator prior to sending the sample.

Final Confirmations

If identifiers or laboratories at the state, university, or institution level suspect they have detected a CAPS target, a plant pest new to the United States, or a quarantine pest of limited distribution in a new state, the specimens should be forwarded to an NIS recognized taxonomic authority for final confirmation. State cooperator and university taxonomists can go through a PPQ area identifier or the appropriate domestic identifier that covers their area to get the specimen in the PPQ system (for those identifiers, see [Lists of PPQ Identifiers and PPQ National Specialists](#)). They will then send it to the NIS recognized authority for that taxonomic group. In cases, domestic identifiers can make final confirmations depending on ID authority, accreditation, and proficiency testing.

State level taxonomists, who are reasonably sure they have a new U.S. record, CAPS target, or new federal quarantine pest, can send the specimen directly to the NIS recognized authority, but must notify their State Survey Coordinator (SSC), PPQ Pest Survey Specialist (PSS), State Plant Health Director (SPHD), and State Plant Regulatory Official (SPRO).

Before forwarding these suspect specimens to identifiers or for confirmation by the NIS recognized authority, please complete a [PPQ form 391](#) with the tentative determination. Also fax or send by e-mail a PDF copy of the completed PPQ Form 391 to the Domestic Diagnostics Coordinator at: ppq.domestic.diagnostic.coordinator@aphis.usda.gov. Include the carrier tracking number in the email.

The addresses of NIS recognized authorities of where suspect specimens are to be sent can be found [here](#).

Use page 18, the “Urgent” listing, for all submissions.

When the specimen is being forwarded to a specialist for final confirmation, use an overnight carrier, insure it is properly and securely packaged, and include the hard copy of the [PPQ form 391](#) marked “Urgent.”

Please contact the acting Domestic Diagnostics Coordinator, if you have questions about a particular sample routing, at phone number: 301-851-2153, or e-mail: ppq.domestic.diagnostic.coordinator@aphis.usda.gov

Digital Images for Confirmation of Domestic Detections

For the above confirmations, do not send digital images for confirmation. Send specimens in these instances. For entry into NAPIS, digital imaging confirmations can be used for new county records for widespread pests by state taxonomists or identifiers if they approve it first. They always have the prerogative to request the specimens be sent. Pests with PPQ regulatory programs may require specimens to be sent to SEL for new county records depending on the species.

Communications of Results

If no suspect CAPS target, program pests, or new detections are found, communication of these identification results can be made by domestic identifiers or taxonomists at other institutions directly back to the submitter. They can be in spread sheet form, on hard copy PPQ form 391’s, or other informal means with the species found, or “no CAPS target or new suspect pest species found”. Good record keeping by the intermediate taxonomists performing these identifications is essential.

All confirmations received from NIS recognized authorities, positive or negative, are communicated by NIS to the National Survey Coordinator (NSC) in PPQ Riverdale. The NSC then notifies the appropriate PPQ Policy Management, Field Operations, and the SPHD and SPRO simultaneously. One of these contacts should forward the results to the originating laboratory, diagnostician, identifier, and/or submitter of the specimen or sample.

Data Entry in NAPIS

For survey data entered into NAPIS, new country and state records should be confirmed

by an NIS recognized authority, while for others that are more widespread, use the identifications from PPQ identifiers or state taxonomists. When in doubt, contact the PPQ Domestic Diagnostic Coordinator or National Survey Coordinator.