Survey Supplies Best Practices

# Background

The Survey Supply Procurement Program (SSPP) has developed the following guidance to help the survey supply process run smoothly. As there are still a few places in the system where errors can occur, there are steps that you can take to help us get products to you on time. By working together, we can ensure that you receive the correct products on time, and that any mistakes are addressed quickly.

# Placing Orders

**IMPORTANT: When placing your orders, please make sure that the shipping address has someone available to accept deliveries.** Ensure that the e-mail and phone number are correct (use a cell number if the office may be closed). UPS will call if they try to make a delivery and the office is closed. UPS may drop off packages at the door without signatures, and a lure package could potentially be left unattended for a long period of time. If lures are not able to be properly refrigerated/frozen, they could become ineffective.

Please ensure your address is correct. We incur high additional charges when a shipping address needs to be changed once the item has been shipped. Tell us as soon as possible when an address change is necessary for an order that has already been placed.

**Developing Your Order**

* As a rule, **please round up your trap and lure orders by 5%**. This reduces the number of smaller orders that come in outside of the ordering open period. This also helps the SSPP project future needs with greater certainty. Do not order supplies for multiple years.
* The SSPP encourages customers to order fresh lures each year. This guarantees that expired or inferior lures are not used and encourages disposing of excess lures at the end of the survey season. In general, most lures should be replaced annually.
* Refer to [Lure Shelf-Life Guidance – Pest Detection](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fdownload.ceris.purdue.edu%2Ffile%2F4477&wdOrigin=BROWSELINK) for additional information on the shelf life and ordering of specific products.

**Placing your order in IPHIS**

Placing items into your cart

* Program Name/Ordered Quantity Field
* When you place an item into your cart that is used for more than one program, please choose the most appropriate Program Name in the “Program Name/Ordered Quantity” field.
* For PPA orders, if you see Farm Bill as an option for that product, choose it. Farm Bill is listed for some products, but not all.
* If Farm Bill is not listed, choose the program that the survey most closely aligns with: Pest Detection, Fruit Fly, Khapra Beetle, etc.
* For CAPS orders, choose Pest Detection as the program.

Order Info Field

* Organization: The Receiver’s organization (state abbreviation + organization (state dept. of agriculture, university, PPQ office, etc.) (Example: NC PPQ; CA Dept. of Ag.).
* Date Needed: Select a date that is about three to four weeks before you need the supplies to start your survey (Example: Survey start date = May 21. Date Needed = May 1). This ensures that there is adequate time to ship the products to you.
* Please do not use arbitrary “Date Needed” dates such as January 1 for surveys that will not start until the summer. This puts undue pressure on the warehouse staff.
* Due to the holidays, January orders will likely not be shipped until the second week of January each year.
* Order Type: Select “New” unless told otherwise.
* Able to receive freight:
* No – you cannot receive freight.
* Yes – you can receive freight.
* Check “Yes” and enter one of these specific comments **into the Comments field describing your setup**:

1) You have a dock and forklift.

2) You do not have a dock and forklift.

3) Also let us know if you need UPS to send a smaller truck (narrow area).

* If you are in a building without a dock/forklift:
* We will arrange for UPS to send a truck with a lift gate.
* You must be willing to take whatever pallets that you requested. The UPS driver will not break the pallets for you.
* You can break the pallets and take the boxes off the pallet individually.
* If the Receiver orders a pallet of supplies, we are able to tell the UPS driver that it is an Inside Delivery. The UPS driver can take the whole pallet inside the building if the door is big enough to roll it in with a pallet jack. Otherwise, the driver will leave it outside.
* Comments: Enter title of project/survey (example: FY2022 CAPS: Pine and EWB/BB).
* **Except for details about freight, do not use the Comments field to communicate to the warehouse staff or UPS.** Reach out to the National Operations Manager with any specific instructions.
* Do not include notes such as “Call ahead before delivery.” You will receive a UPS notification once the products are shipped. The Survey Supplies staff is not able to notify you of when items will be delivered. Please use a shipping address where someone will be available to receive orders.

Order Receiver Field

* Enter correct phone numbers and email addresses. UPS may need to call the receiver in case they can’t find the address/building.
* Secondary Email: Please list any other individuals that need to be aware of the order. If desired, list the Pest Survey Specialist (PSS) or other PPQ staff person in this field. This will ensure that your PPQ liaison receives information on the order (order was placed, order was shipped, etc.). This is optional but may benefit you.
* Address: **Do not use P.O. boxes.**
* Provide an address where there will always be someone available to receive orders. We are not able to call ahead before shipments arrive.
* If this is an institution (university, department of agriculture, etc.), please include the name of the institution in the “Address 1” field.

# Approved Orders

* Once you have entered your order, you may not receive any notifications until the order has been approved by a member of the Survey Supply Procurement Team.
* Once the order has been approved, the person who placed the order and anyone in the secondary email box will receive an email saying that the order has been approved. The email will come from “PPQPIDSADMIN@aphis.usda.gov.” In the subject line it will say “Your order number XXXX has been approved.”
* Please review the email and make sure that the products, quantities requested, and **all** contact information is correct.
* All orders will be approved by a member of the Survey Supply Procurement Team by one week after the open period closes.
* **If you do not receive an approval email by one week after the ordering open period has closed, contact Darrell Bays (****darrell.a.bays@usda.gov****).**

# Order Status

**UPS Email**

* When the package leaves the Survey Supply warehouse, a UPS e-mail will automatically generate that notifies you of a shipment being delivered.
* Normally, the e-mail message will provide details of the package weight, where it is coming from, and a tracking number.
* If a package is lost, please call your local UPS store and provide the tracking number.
* **Once the package has left the warehouse, the customer should contact the local UPS store for any shipping changes or specific instructions.**
* Online tools such as [UPS My Choice](https://www.ups.com/cn/en/services/tracking/mychoice.page) is a helpful online option which can help you arrange specific drop off times and or edit additional options for your shipment delivery.

**Order Status in IPHIS**

* Once the package has shipped, the order status will be updated in IPHIS by the following morning. You will receive an email from IPHIS with shipping information.
* Order status can be viewed in IPHIS in the My Orders screen.
* For backordered products, please email Darrell Bays (darrell.a.bays@usda.gov) to receive status updates as needed. Include the order number and the product(s) in question for reference.

# Receiving Products

**IMPORTANT:** UPS may drop off packages at the doors without signatures and a lure package could potentially be left unattended for a long period of time. If lures are not able to be properly refrigerated/frozen, they could become ineffective.

**IMPORTANT:** Upon receiving your order, **promptly open the box and check all supplies against your order form.** You may contact National Operations Manager Darrell Bays (darrell.a.bays@usda.gov) to inquire about deviations from your expected order. Sometimes the warehouse is waiting delivery of items from the manufacturer; other times there could be an error in shipping we need to address. **If caught early, we can quickly address the issue.** If you do not notify us until the survey season starts, there may be a delay if products are not in stock.

Please also check expiration dates on all products and ensure that the product will still be effective through your entire intended survey season.

You can also use the “My Orders” page in IPHIS to view the status of your orders. Feel free to reach out to Darrell with any questions about your order.

# Lure Packaging and Storage

Some lures are sourced from commercial vendors, while others are produced by PPQ at the Forest Pest Methods Laboratory (FPML). Lures produced by the FPML are packed in packs of five (5), for maximum output efficiency and cost-effectiveness.

If all five lures cannot be deployed at the same time, the FPML advises folding over the open edge of the lure package a few times, and securing it with a paper clip or binder clip. Alternatively, lure packaging can be resealed using an inexpensive electric sealing device such as this: [Tabletop Impulse Sealers in Stock - ULINE](https://www.uline.com/BL_2253/Tabletop-Impulse-Sealers). The FPML advises that storing resealed packages using either method will prevent loss of lure effectiveness cross contamination of active ingredients with other lures, when used within the same season they were opened.

If resealing opened packages is a concern for your program, we advise you to increase your order accordingly. We have compared the costs associated with individually packaging lures at the FPML with continuing production of lure 5-packs, considering that some offices will need to increase their order to accommodate disposal of opened packages. The cost benefit of 5-packs outweighs individually wrapped lures, even if more 5-packs must be produced to meet needs.

# Guidance on Survey Supply orders placed outside of open periods

The Survey Supply Procurement Program requests that orders placed outside of established ordering periods be minimized. The Program requests that State Plant Health Directors and Pest Survey Specialists work closely with their state counterparts to ensure orders are placed accurately and that no supplies are missing. The Program will continue to provide webinars on how to place and approve orders. Information is also available online:

* [Video - Placing Survey Supply Orders in IPHIS](https://download.ceris.purdue.edu/file/4286)
* [Slides - Placing Survey Supply Orders in IPHIS](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fdownload.ceris.purdue.edu%2Ffile%2F4476&wdOrigin=BROWSELINK)

For orders placed outside of established ordering periods, the Survey Supply Procurement Program **cannot guarantee** that products will be in stock or able to be shipped by the requested date. The Program will continue to monitor the number of orders placed outside of the open period. If not reduced, a “hard close” of the ordering database may become necessary.

# Instructions for requests outside open period

If additional orders are needed outside of established ordering periods, please fill out this [order form](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fdownload.ceris.purdue.edu%2Ffile%2F4401&wdOrigin=BROWSELINK) **completely** and send it to National Operations Manager Darrell Bays (darrell.a.bays@usda.gov).

# Communication

For questions about your orders, if you are a state cooperator, please reach out to your Pest Survey Specialist first. From there, please reach out to your assigned National Operations Manager. **Please do not contact the Moore Airbase or the PPQ Science and Technology Forest Pest Methods Laboratory staff directly unless you have been told by the NOM to do so.** Include the order number and the product(s) in question for reference.

Prepared by:

Darrell Bays (Field Operations)

Waleska Ramirez (Emergency and Domestic Programs)

Allard Cosse (Science and Technology)

Janet Casas (Field Operations)

Jaime Cavazos (Field Operations)

Joaquin Jimenez (Field Operations)

Gabriel Lopez (Field Operations)

Appendix 1

The products listed below were recently updated in our IPHIS catalog to reflect how are they packed, providing additional guidance when ordering the products. The community needs to be aware of these changes before the catalog opens for our next ordering period, and/or in need of an emergency order.

Please find the specifics below:

|  |  |  |
| --- | --- | --- |
| **IPHIS ID NO.** | **Product Name** | **Notes** |
| 74 | Alpha pinene UHR lure | NOTE: This product is packed in multiples of 20. **Please order in multiples of 20, round up your desired quantity to the nearest multiple of 20** i.e. if you need 45 units, you should order 60 units. |
| 1261 | Ammonium Acetate Lure, Bait Enhancer | NOTE: This product is packed in multiples of 10. **Please order in multiples of 10, round up your desired quantity to the nearest multiple of 10** i.e. if you need 45 units, you should order 50 units. |
| 59 | Ethanol lure | NOTE: This product is packed in multiples of 20. **Please order in multiples of 20, round up your desired quantity to the nearest multiple of 20** i.e. if you need 45 units, you should order 60 units. |
| 105 | Ips sp. lure | NOTE: This product is packed in multiples of 10. **Please order in multiples of 10, round up your desired quantity to the nearest multiple of 10** i.e. if you need 45 units, you should order 50 units. |
| 703 | Palm weevil lure, ethyl acetate | NOTE: This product is packed in multiples of 25. **Please order in multiples of 25, round up your desired quantity to the nearest multiple of 25** i.e. if you need 45 units, you should order 50 units. |
| 138 | Pesticide Strip - DDVP, Large | NOTE: This product is packed in multiples of 50. **Please order in multiples of 50, round up your desired quantity to the nearest multiple of 50** i.e. if you need 175 units, you should order 200 units. |
| 144 | Pesticide Strip - DDVP, Small | NOTE: This product is packed in multiples of 25. **Please order in multiples of 25, round up your desired quantity to the nearest multiple of 25** i.e. if you need 45 units, you should order 50 units. |
| 77 | Spruce blend lure | NOTE: This product is packed in multiples of 20. **Please order in multiples of 20, round up your desired quantity to the nearest multiple of 20** i.e. if you need 45 units, you should order 60 units. |
| 67 | Torula yeast pellets | NOTE: Unit of measure for this product is pounds, **please order this product in pounds.** There are approximately 32 Torula yeast pellets in one pound. |