SCION Applicant Portal User Guide

Version II

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United States Department of Agriculture

Contents

1. Overview

Welcome to the **SCION Applicant Portal** User Guide!

SCION is the Specialty Crops Integrated Operating Network, a web-based platform that modernizes the way USDA provides specialty crops inspection and audit services. The USDA Specialty Crops Inspection (SCI) Division and our cooperative Federal-State inspectors and auditors will use SCION to schedule our work, carry out inspections/audits, issue certificates, reports, and billing statements to our applicants. You – our customer – will use SCION to go online and set up and manage your account, submit inspection, and audit service requests, and get your inspection results, certificates, audit reports, and billing statements.

The SCION Applicant Portal is our customers' door to SCION. On the Applicant Portal website, you can quickly and easily set up and manage your account with SCI, request services, upload supporting documents, review billing charges, and download certificates and other documents. The Portal is open to all applicants at all SCI locations.

2. Create a SCION Account

The first time you enter the SCION Applicant Portal, you will see either your company's account or a "SCION Bucket Account 1" on your Dashboard header depending on whether your user contact information was previously assigned to an account. If you see the "SCION Bucket Account 1" header when you log in, please ask your local office to assign you to the correct account. SCI may need to get approval from the "Point of Contact" that is already listed in SCION to ensure account access is authorized.

Customers should decide which type of account suites their business: a National or Local account:

• National Account is for customers who either:

- Request inspection services from multiple SCI Area Offices across the country, have a single point of contact for all their service or billing activities, and want a single, aggregated bill (or a bill from each office) for all inspection/audit services provided to their subsidiary units, or
- Have multiple applicant subsidiary units and users that need to see/access/manage the subsidiary units in SCION.

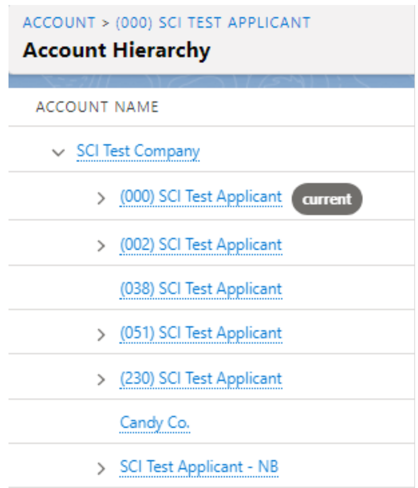
• Local Account is for customers who:

- Request inspection services in a single SCI Area Office or multiple offices (if using the same FMMI account number), and want to receive service results and billing locally.

To change your account type in SCION, please contact your local office.

The account creation process only takes place the first time you use SCION.

2.1 SCION Account Structure



National account will contain one or more Local accounts. In the Account Hierarchy (Figure X), "SCI Test Company" users can view and manage the local applicant accounts listed.

SCI may use a three-digit number in parentheses at the beginning of a local account name to identify the USDA office that services the account. See Appendix A for a list of *SCI 3-Digit Office Identifiers*.

2.2 Create a SCION Account

You must have USDA Level 2 eAuthentication.

eAuthentication is the system used by USDA to allow individual customers and employees to obtain accounts that give them access to USDA web applications like SCION via the internet. A single eAuth account saves time and reduces the number of passwords you'll need to access SCION as well as other USDA resources and programs. A brief presentation that gives step-by-step instructions for getting eAuthenticated, and a more detailed USDA

eAuthentication User Guide are posted on the SCION webpage at https://www.ams.usda.gov/services/scion.

3. Log Into the Applicant Portal

With your log-in and account information created (Ref. Sec. 2.1), you can now access and use the SCION Applicant Portal. Be sure to add SCION to your favorites on your web browser!

3.1 Log Into the SCION Applicant Portal

1. Navigate to the SCION Applicant Portal through eAuthentication on your web browser.
2. Enter the email address associated with your SCION Account (Ref. Fig. 3.0).

3. Click *Login with password* and enter your password.

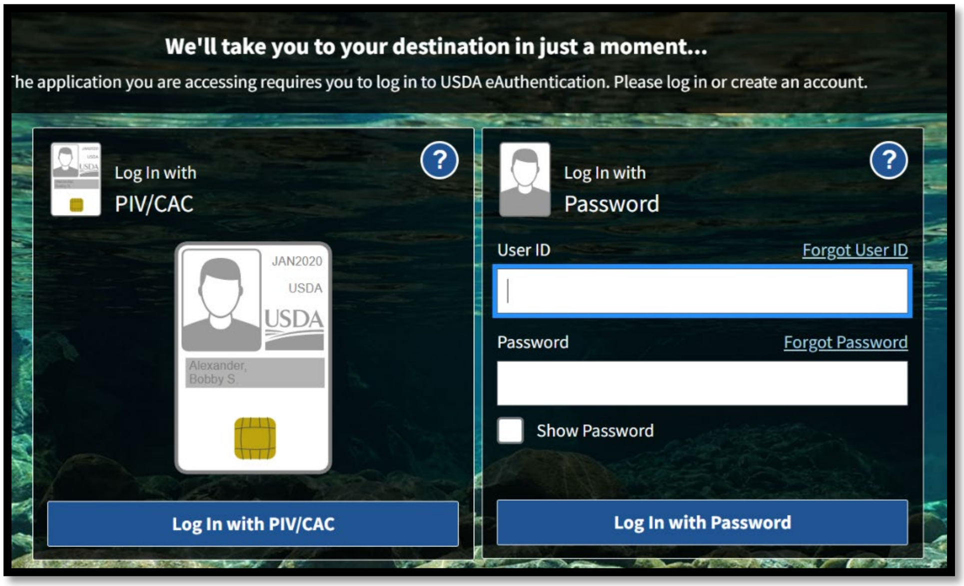


Figure 3.0: Log-In to the Applicant Portal

Once you are logged in, you'll see your SCION Applicant Portal Dashboard.

4. Navigate the Applicant Portal – National Account Users

4.1 Dashboard (Home Page)

The Dashboard for a National Account user is your SCION home page. From the Dashboard, you can view the account and user information for your local accounts, navigate to Pay.gov to pay your bills, access an Executive Summary of your national account data such as the total number of submitted or completed service requests for your account, and manage your account information.

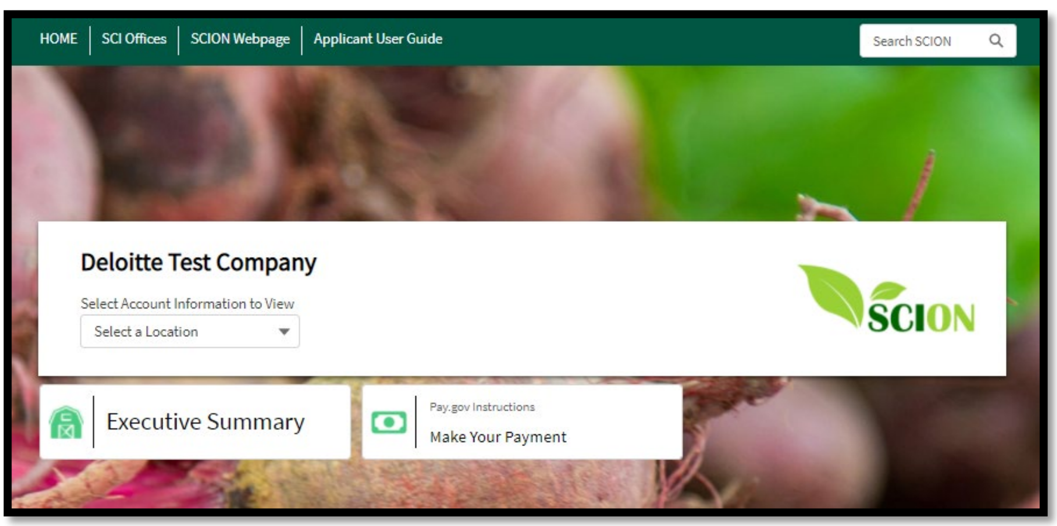


Figure 4.0: Dashboard

4.1.1 Manage Your Local Accounts

On the Dashboard, you can:

- **Submit a new service request:** see Section 5.1.2 of this guide.
- **View In-Progress Services**: This screen shows the five most recently created service requests that have not yet been completed for the selected local account. See Section 5.1.5 for information about Incomplete Service Requests.
- **View Completed Services**: This screen shows the five most recently created and completed service requests for the specific local account. See Section 5.1.6 for details.
- **View Itemized Service Charges**: The screen shows the five most recently created billing statements for the specific facility. See Section 5.1.7 for details.

4.1.2 Pay Your Bill via Pay.Gov

SCION does not handle billing, it simply navigates you to Pay.gov site, where the bill payment process remains the same.

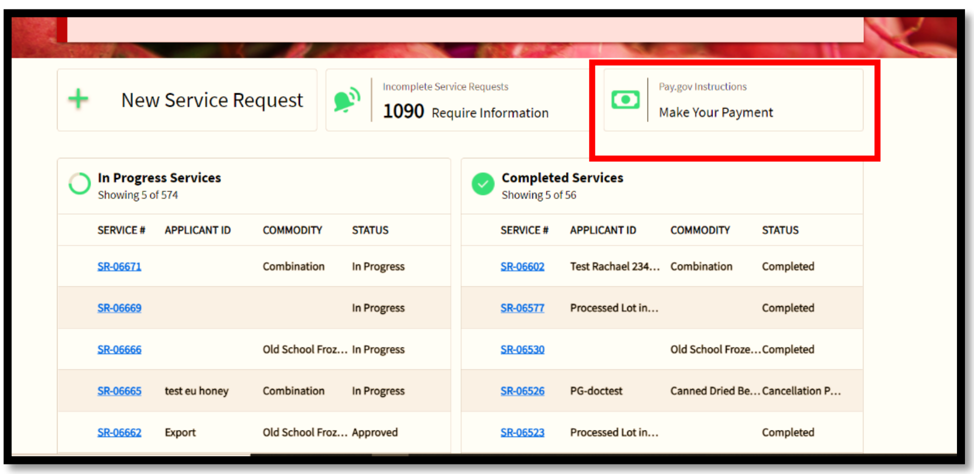


Figure 4.1: Pay.gov Instructions

Click *Pay.gov Instructions – Make Your Payment* to go to a screen that includes:

- A link to the Specialty Crops Collections Pay.gov site.
- Instructions for completing paying your bill.
- Instructions for printing your payment confirmation.

4.2 Executive Summary

The Executive Summary provides information such as your national account's pending and completed service requests.

To go to your Executive Summary

1. Click *Executive Summary* button on the Dashboard, **or**
2. Click *Account* in the upper right-hand corner of the screen and then click the Executive Summary tab.

There you will see the following information for each of your local accounts (Ref. Fig. 4.2):

- Total number of submitted service requests per location for a given time period.
- Total number of completed service requests per location for a given time period.
- Total billing amount per location for a given time period.

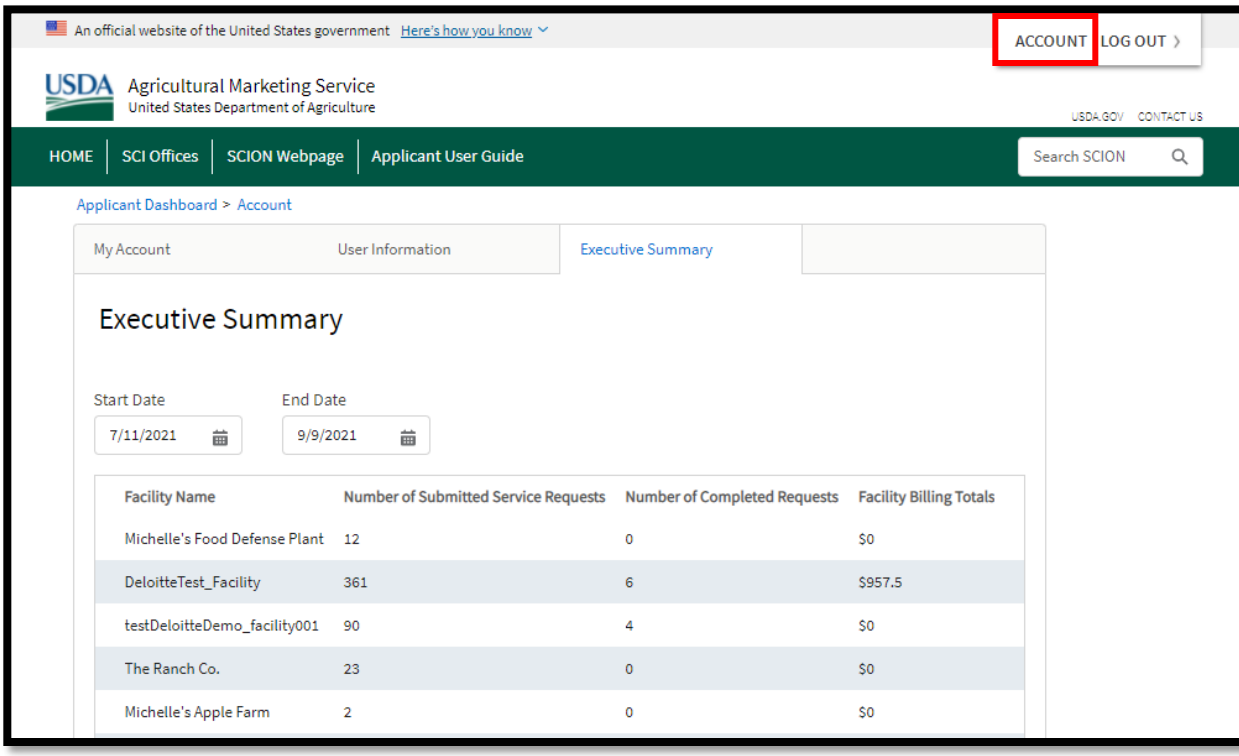


Figure 4.2: Executive Summary

4.3 Account Information

Click *Account* on the top right-hand corner of the Dashboard to see information about your local and national accounts, account users, and local facility locations. Reference Fig 4.2.

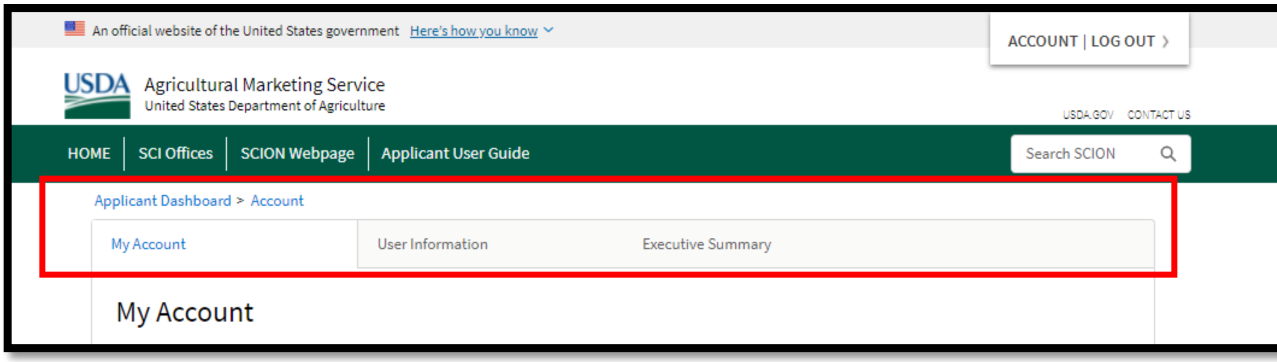


Figure 4.3: Account Information

On the Account page, you'll see:

1. *My Account* is the default tab, showing your account and user information, including your shipping/billing addresses, primary SCI servicing office, and billing account status.
2. Click *User Information* to see basic user information for all your corporate account users.
   a. Click *Add Colleague* to add individuals/users to your SCION applicant account
   b. Fill in the user details and click *Save.*
   c. The added user will receive an email prompting them to register in SCION. Please remember that all SCION users must have USDA e-authentication (Ref. Sec. 2.1).
   d. Review the list in the table (in the User Information tab) to locate a colleague/user:
      i. Select specific page number on the table to, or
      ii. Use the < and > icons at the bottom of the page to navigate through the pages to locate the user.
3. Click *Executive Summary* to view the listed summary of facilities or local accounts under the national account with submitted service requests, completed service requests, and billing total. See Section 4.2. This is same tab/screen you will come to when you click the *Executive Summary* button on the Dashboard/Home page.

5. Navigate the Applicant Portal – Local User

5.1 Dashboard (Home Page)

The Dashboard for a Local user is your SCION home page. From the Dashboard, you can create and manage your service request, view billing statements, manage your account information, and navigate to Pay.gov to pay your bills (Ref. Fig. 5.0).

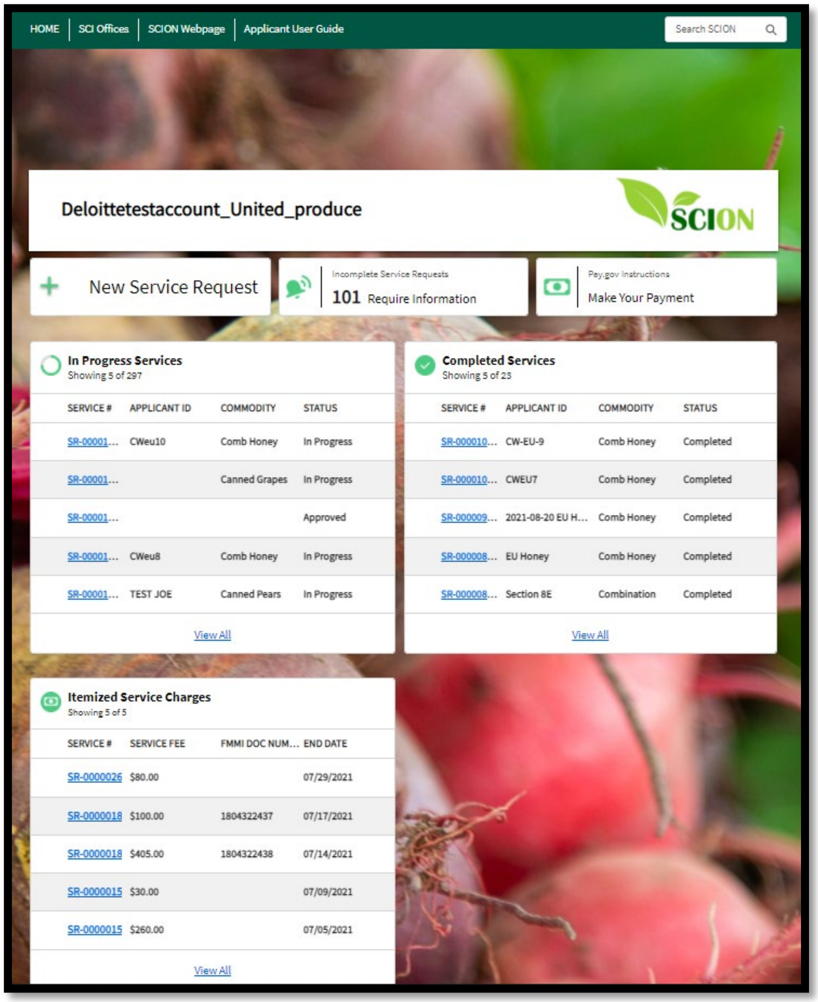


Figure 5.0: Dashboard

5.1.1 Missing Information

If you have not yet uploaded or provided any required documents for a service request, the following box will show up in the first section of the Dashboard (Ref. Fig 5.1). You must upload the required documents for your service request to proceed.

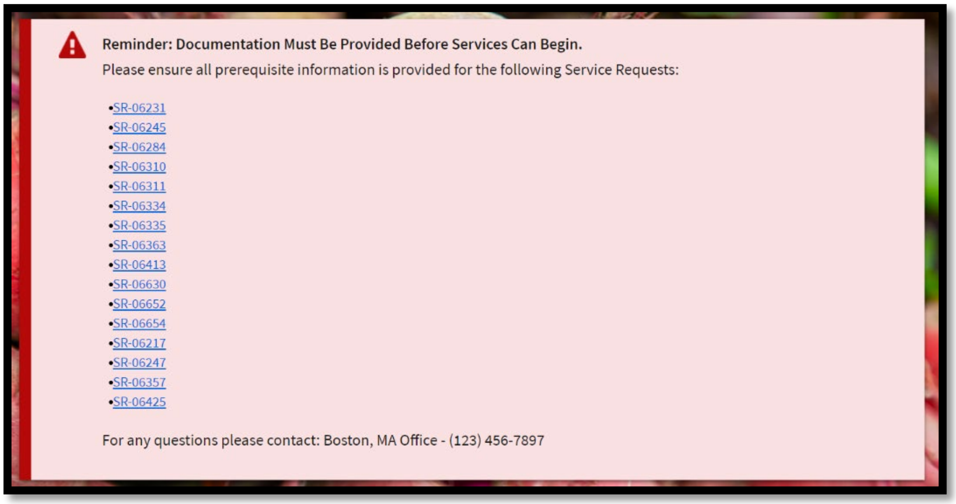


Figure 5.1: Missing Information or Documentation on Dashboard

1. Click the displayed service request.
2. At the Service Request Details page, click *Add* in the Related Documents section to upload your document(s).

5.1.2 Create a Service Request

1. Click +*New Service Request*
2. On the Service Request page, create and submit a service request by completing the necessary details. (Ref. Sec. 6, **Create a Service Request**, for details).
   a. While creating a new service request, you can click *Save & Exit* to save your request as a draft and come back to it later.

5.1.3 Incomplete Service Requests

Incomplete Service Requests are the service requests, in *Draft* status, you started in SCION but did not complete or submit.

These are not the same as the requests in the M*issing Information Reminder* box on your Dashboard, which are requests that you submitted that requires additional documents from you (Ref. Fig. 5.2).

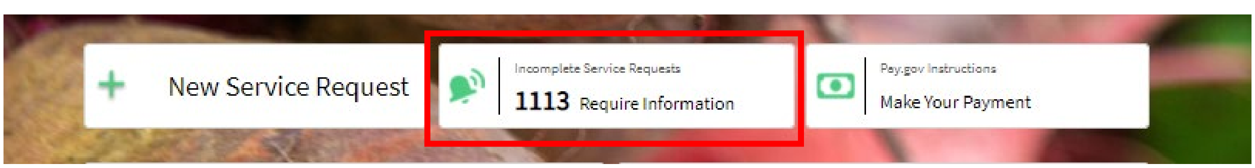


Figure 5.2: Incomplete Service Requests shown on the Dashboard

1. Click *Incomplete Service Requests* on the Dashboard to see your incomplete service requests, with the most recent requests at the top. You can sort the records in the table using the ↑ and ↓ arrows on each of the column headers.
2. To navigate to a specific request or look for additional service requests:
   a. Scroll to the bottom of the table.
   b. Click on the dropdown field that displays all the pages.
   c. Click a page number to navigate to that page, and
   d. Click the service request you are trying to access.
   or
   e. Click the < and > icons to navigate to a page and locate the service request.
3. Click the link for the service request in the *Service #* column to go to the Request Details screen.
4. Click *Complete Service Request* at the bottom of the screen to finalize the service request.

5.1.4 Pay.gov Instructions

[See Section 4.1.2 for details]

5.1.5 In-Progress Services

This table shows your five most recent service requests that are in-progress with SCI, which means the service requests are yet to completed by SCI and the appointment for the inspection/audit might be in the future (Ref. Fig. 5.3).

1. Click *View All* at the bottom of the table to go to a page that displays all of your outstanding service requests.
2. Sort the records in the table by using the ↑ and ↓ arrows on each of the column headers and filter service requests by using the start and end date fields on the top left.
3. To navigate to a specific service request or look for additional service requests:
   a. Scroll to the bottom of the table and click the dropdown field that displays all the pages.
   b. Click a page number to go to a specific page and select the service request.
   Or,

c. Click the < and > icons at the bottom of the page to navigate to a page and locate the service request.

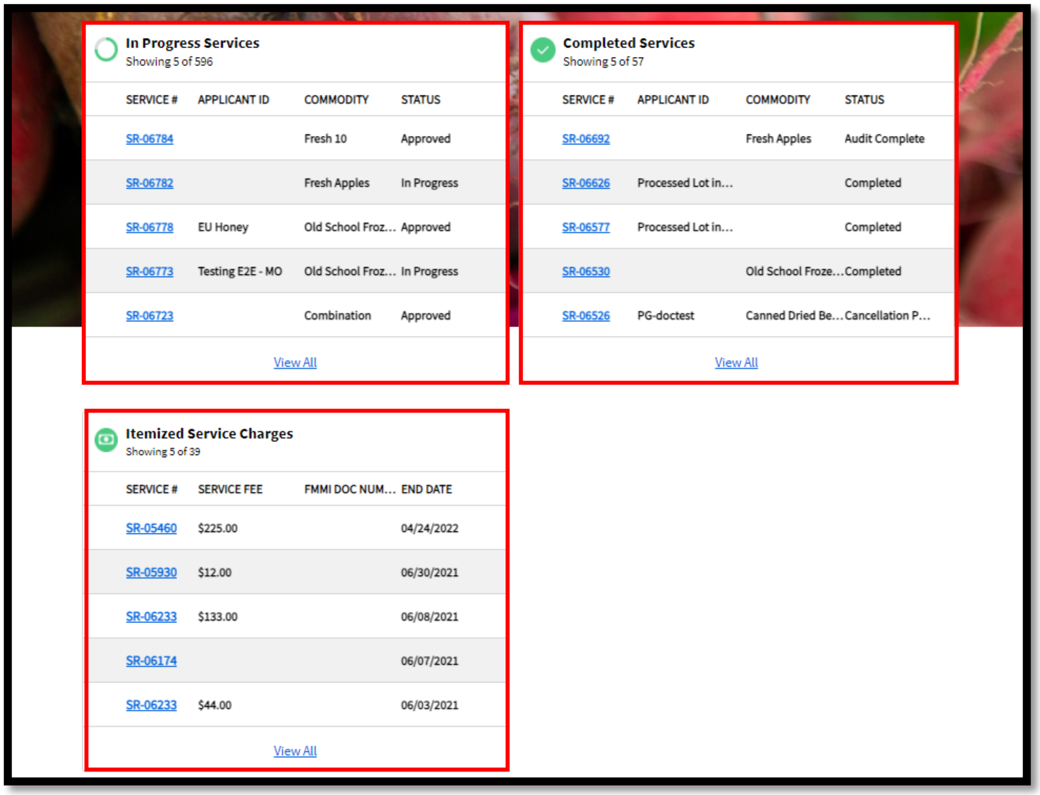


Figure 5.3: Local Account User Dashboard

5.1.6 Completed Services

This table shows the five most recently completed service requests for the local account. The requests shown here are the ones completed by SCI and the certificates or the inspection documents will be made available to the applicant through the Applicant Portal.

1. Click *View All* at the bottom of the table to see all the completed service requests for your Local Account (Ref. Fig. 5.3).
2. Sort the records in the table using the ↑ and ↓ arrows on each of the column headers, and filter service requests using the start and end date fields on the top left.
3. To navigate to a specific request or look for additional service requests:
   a. Scroll to the bottom of the table.
   b. Click the dropdown field that displays all the pages.
   c. Click a page number to navigate to a specific page.
   d. Select the service request.
   Or,
   e. Use the < and > icons at the bottom of the page to navigate to a specific page to locate the service request.

5.1.7 Itemized Service Charge

This table shows the five most recently created itemized service charges for completed services (Ref. Fig. 5.3).

1. Click *View All* at the bottom of the table to go to a page that shows all itemized service charges for completed service requests for your Local User account.
2. Filter itemized service charges using the start and end date fields on the top left.
3. To navigate to a specific itemized service charge or look for additional service charges:
   a. Scroll to the bottom of the table and click on the dropdown field that displays all the pages.
   b. Click on a page number that will navigate you to that page and the appropriate service request.
   c. Click either the Service # or the Details link pertaining to the service request.
   Or,
   d. Use the < and > icons at the bottom of the page to navigate to a specific page and locate the statement for service charges.

5.2 Account Information

From the Dashboard, click Account on the top right-hand corner to go to a page where you can view and manage the following information: My Account, User Information, My Locations, and My Contacts (Ref. Fig. 5.4).

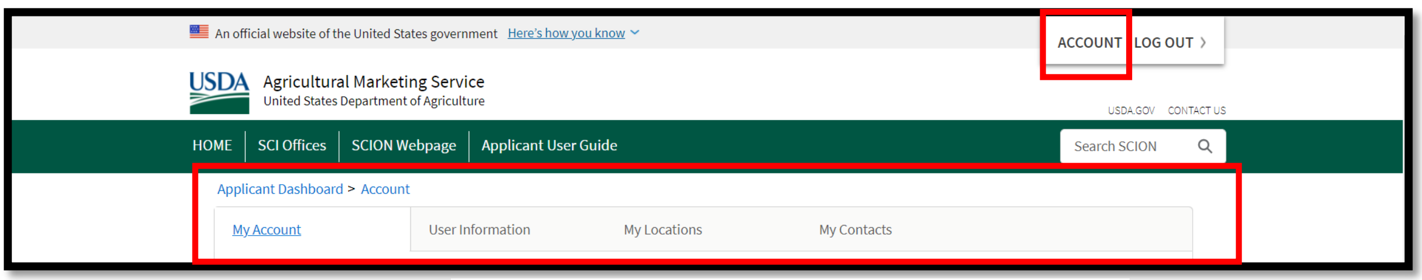


Figure 5.4: Account Information

5.2.1 My Account

This is the default view on this page. The My Account Information section shows an overview of your Local Account, including addresses, your primary SCI servicing office, and your billing account status. The My User Information section shows basic information about your user profile.

5.2.2 User Information

Click on this tab to display a list of your Local account users and their basic information.

1. Click *Add Colleague* to invite your colleagues to be added to your SCION account
   a. Fill out the user details and click *Save*.
   b. Your colleague will receive an email notification prompting them to register. Once they have successfully registered, they will appear as a user in the User Information table.
2. To locate a specific user:
   a. Scroll to the bottom of the table and click the dropdown field that displays all the pages.
   b. Click a page number to navigate to that page and view the user.
   or
   c. Use the < and > icons at the bottom of the page to navigate to a specific page and locate the user.

5.2.3 My Locations

Click on this tab to display a list of facility accounts and some other basic information that are associated with your Local Account.

1. Sort the records in the table using the ↑ and ↓ arrows on each of the column headers.
2. Click *Add location.*
   a. Complete the information field about the location.
3. Click *Edit* to make edits to information about a listed location.
4. Click Delete to delete an existing location.
5. To locate a specific location:
   a. Scroll to the bottom of the table.
   b. Click the dropdown field that displays all the pages.
   c. Click a page number to navigate to that page and view the location.
   Or,
   d. Use the < and > icons at the bottom of the page to navigate to a specific page and locate the desired location.

5.2.4 My Contacts

Click on this tab to display a list of contacts associated with your Facility account, e.g., shippers, buyer/receivers, results recipients, and billing contacts. These contacts do not have access to SCION.

1. Sort the records in the table using the ↑ and ↓ arrows on each of the column headers.

2. Click *Add Contact* to open a window that asks you for some basic information about the contact.
3. Click *Edit* to amend contact information.
4. Click *Delete* to delete the contact.
5. To locate a specific contact:
    a. Scroll to the bottom of the table
    b. Click the dropdown field that displays all the pages.
    c. Click a page number to navigate to a specific page and view a contact.
    Or,

Use the < and > icons at the bottom of the page to navigate to a specific page and locate a contact.

6. Create a New Service Request

In the SCION Applicant Portal, you can create new service requests for Audits and Processed Commodity Lot Inspections.

6.1 Create an Audit Service Request

1. Log into the SCION Applicant Portal (See Section 3.1).
2. Click +*New Service Request* on the Dashboard (Home page) (Ref. Fig. 6.0).

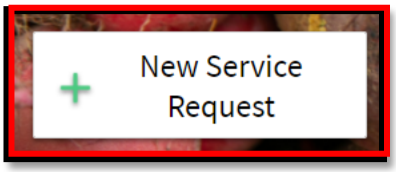


Figure 6.0: New Service Request button

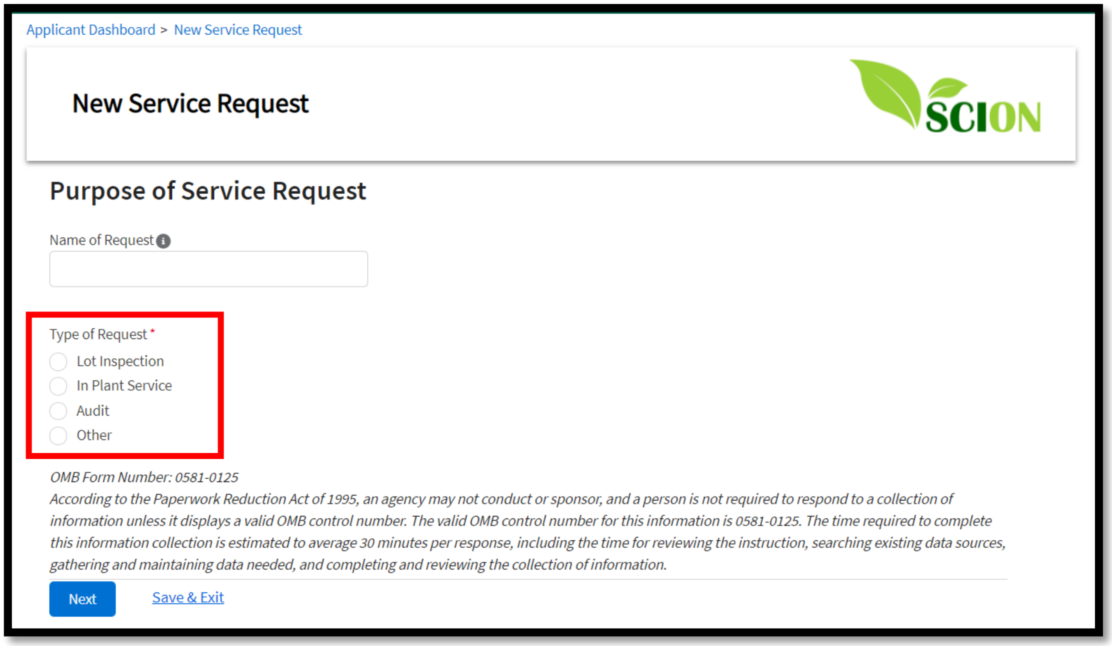


Figure 6.1: New Service Request Page

- While creating a new service request, you can click *Save & Exit* to save your request as a draft and come back to it later.
- Click *Cancel Service Request* if you want to cancel a service request.

3. On the *Purpose of Service Request* screen:
    a. Enter the *Name of Request*. This can be any name you would like and is how you can locate or identify the specific request.
    b. Choose "Audit" as the *Type of Request* by clicking on the adjacent radio button.
    c. Select "Fresh" or "Processed" in the *Select type of commodity covered by the service request* field.
    d. Click *Next* to move to the Audit Selection screen.
4. Select an option from the drop-down *"What type of audit is needed?"*
    a. If you select "Fresh" as the type of commodity, the options on the drop down will be:
        - USDA GAP
        - USDA Harmonized GAP
        - GMP/PC
        - USDA Mushroom GAP
        - Food Defense
        - Hazard Analysis Critical Control Point (HAACP)
        - USDA Harmonized GAP Plus
        - Plant Survey
        - I Don't Know
    b. If you select "Processed" as the type of commodity, the options on the drop down will be:

- GMP/PC
- Domestic Origin Verification (DOV)*
- Food Defense*
- Hazard Analysis Critical Control Point (HAACP)*
- Plant Survey*
- I Don't Know

***** *If you select DOV, Food Defense, HAACP, or Plant Survey for either fresh or processed commodities, you will have the option to select other surveys to add to your request.*

5. Click *Next* and navigate to Auditee Information screen and fill out the required fields (Ref. Fig. 6.2).
   a. Enter *Number of Employees.*
   b. Enter any *Special Language Needs* as needed.
   c. Select 'Yes' or 'No' for *'Permission to interview staff?*
   d. Add your location and auditee information:
      i. Type the location name on the *Search an Existing Location bar.*
      ii. Select the existing location from the dropdown list. This will open an *Auditee Information & Contact* window.
      iii. Select an existing contact or click *Add New Contact* to add a new contact.
      iv. Click *Save Location and Contact.*
      or
      v. Click *Add New Location* to enter auditee and facility name, street address, facility type, and facility size.
      vi. Click *Save Location and Contact.*
   e. Click *Add New Site* to provide additional audit sites in the table that appears, if needed.
      i. Enter information on the Additional Audit Sites window.

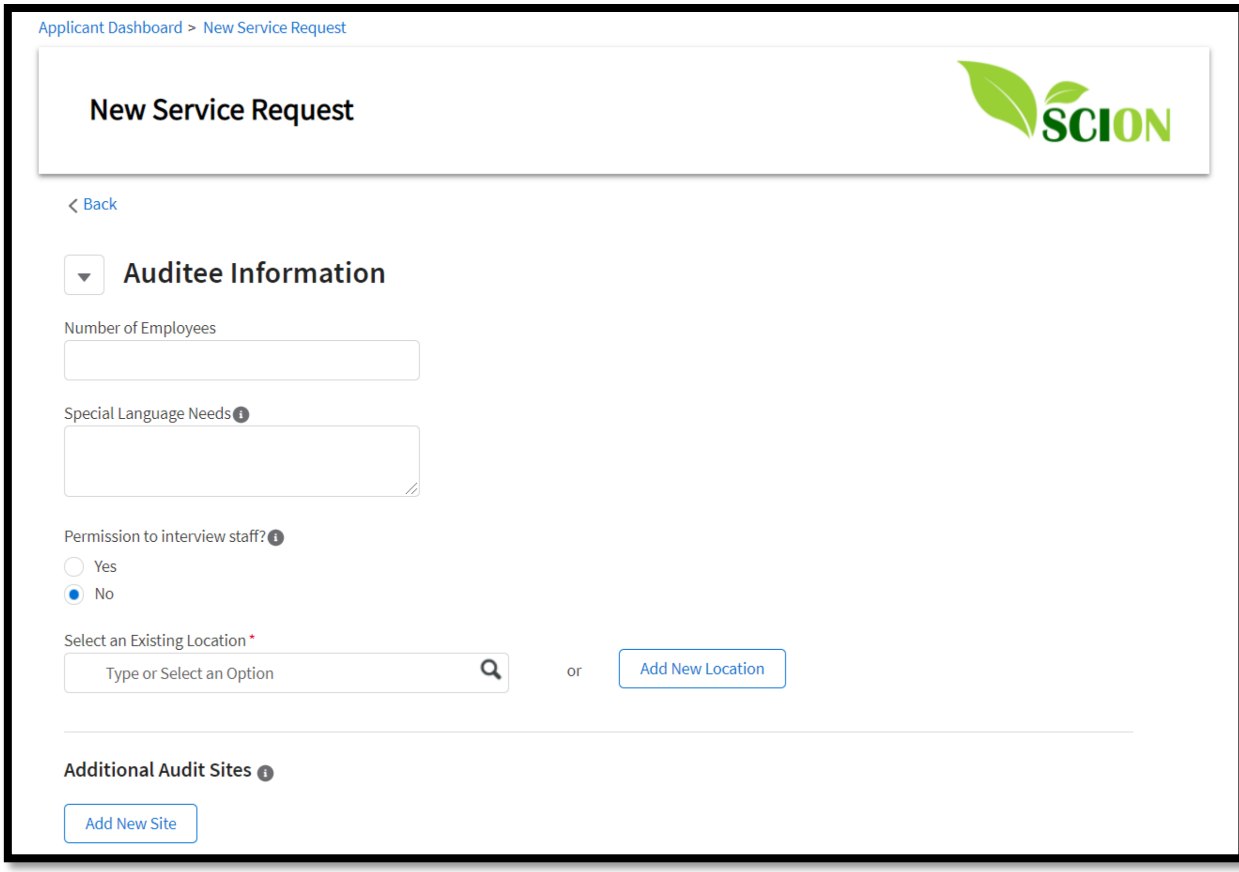


Figure 6.2: Auditee Information Page

ii. Click *Save Audit Site.*

iii. Verify the information you entered appears in the table in the *Additional Audit Sites* section.

f. Click *Add Commodity* to provide required information on commodities to be audited. You will go to a window called Commodities Covered by Audit.

i. Enter the name of the commodity in *Enter Commodity to Add* field.

ii. Complete *Length of Season or Processing Period* field, as applicable.

iii. Click *Save.*

g. Select a timeframe for your audit in the *Requested Date Range* section.

i. Select an *Earliest and Latest Start Date* (Date and Time).

ii. Enter any relevant notes or requests in the *Additional Scheduling Details* box.

iii. Click Next to go to the *Supporting Documentation* screen.

6.1.1 Upload Supporting Documents

Use this screen to upload required documents for your audit request. (If you are not uploading documents, click *Next* on the *Continue Without Uploading* window.)

1. Click *Upload Files* under the SC-651 section to upload a completed SC-651, Agreement for Participation in Audit Verification Programs.

2. Click *Upload Files* under the *Other Supporting Documents (Optional)* section to upload other supporting documents.
3. Click *Next* to go to the Service Results and Billing screen.

6.1.2 Managing Service Results and Billing

Here is where you manage the distribution of your audit service results and billing information.

6.1.2.1 Audit Service Results

1. Select *Yes* or *No* on the *Will audit reports need to be uploaded to the "Azzule database"* field. Azzule is commercial database to which customers can elect to upload results of a USDA GAP audit for a fee.
2. Complete the *Results Recipients* section:
   a. Enter the name or other identifying information in the *Select an Existing Contact* box to search for a contact.
   b. Select the contact from the list that appears to open the *Add Service Results Contact* window.
   c. Click *Role of Contact Person* and *Distribution Method*, which are mandatory fields.
   d. Fill out or confirm the required fields.
   e. Click *Save* and you will see recipients' details.
   f. Click *Add New Contact* to add a new result recipient.
   g. Enter required information on the Add Service Results Contact screen.
   h. Click Save & Exit any time during the service request creation process to save your service request and all data entered until that point a draft that will be accessible to you via your Dashboard.

6.1.2.2 Audit Billing

1. Fill out the required information in the *Estimated Billing Information* section:
   a. Enter the name or other identifying information into the *Select an Existing Contact* box to search for a contact.
   b. Select a contact from the list that appears and to open the Add Billing Contact window.
   c. Complete the mandatory fields *Distribution Method, Email, Phone,* Confirm or complete the required fields.
   d. Click *Save* to see the recipients' details.
   e. Click *Add New Contact* to add a new billing contact.
   f. if you would like to speak to an SCI representative about billing, click '*I would like to speak to an SCI staff member to discuss estimated fees for the request service.*' SCI will get in touch using the SCION contact information you provided.

6.1.3 Review and Submit Audit Request

Please review the *Purpose*, *Auditee Information*, *Service Results & Billing Attachments*, and *Prerequisite Fulfillments* information to ensure it is accurate, and review SCI's Terms & Conditions at the bottom of the page before submitting your audit request.

1. Click *Submit* to send your audit service request to SCI.
2. Review the confirmation message you receive and note the associated Service Request (SR) number (e.g., SR-XXXXX).
3. Click *Finish* to go to the Request Details page for a summary of the service request information you submitted.

6.2 Processed Commodity Lot and In-Plant Inspections

To create a new service request for processed commodity or in-plant lot inspections:

1. Log into the SCION Applicant Portal.
2. Click *New Service Request* on your Dashboard.

Note that you can click *Save & Exit* at any time when creating a new service request. Your service request and all data entered to that point will be saved as a draft and be accessible to you via the Applicant Portal under Incomplete Service Requests.

6.2.1 Create Service Request

1. Complete *Name of Request.* This can be any name you choose and is how you can locate or identify the specific request.
2. Select the *Type of Request*, e.g., Lot Inspection, In-Plant Inspection.
3. Select an option from the dropdown menu, e.g., Lot Inspection, Operational Rations, Raisins, Continuous, Seasonal, Intermittent, and Designated Lot.
4. Select "Not Applicable" for basic Lot Inspection Service.
5. If applicable, indicate whether this inspection request is related to any of the following options:
   - Section 8e Import
   - Marketing Order
   - Export
   - Inspection for USDA Purchase(s)
   - Inspection for State Order(s)
   - Operational Rations
   - Tomato Suspension Agreement
   - Not Applicable

Choosing any of these options prompts the system to ask for additional information about the purpose of the service. If you select any of these options, please jump to Section 6.3.

6.2.2 Basic Lot or In-Plant Inspection Service Request

1. Click Processed for the *Select type of commodity covered by the service request*.
2. Click *Next* to navigate to the Commodity Information screen (Ref. Fig. 6.3).

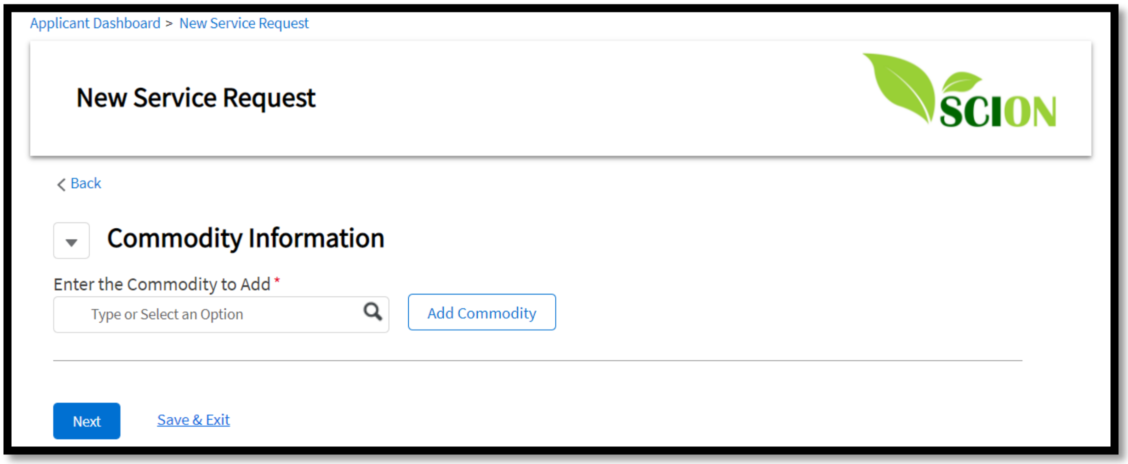


Figure 6.3: Commodity Information

3. Enter the commodity in the *Type or Select Option* field to see a list of commodities.
4. Click the commodity you want inspected.
5. Click *Add Commodity* to add the commodity you selected to the service request.
6. Click *Next to* navigate to Location & Scheduling Screen.

6.2.3 Location and Scheduling

1. Type the location name in the *Select an Existing Location* field and then select the existing location from the dropdown that appears (Ref. Fig 6.4).
2. Select an existing Contact or add a new contact by clicking on the *Add New Contact* button in the Add Location and Contact screen that opens up.
3. Click *Save Location and Contact*
   or,
4. Click *Add New Location* to enter new facility/location name, street address, and facility size (Ref. Fig. 6.5).
5. Click Save Location.
6. Select from an existing contact from the *Select an Existing Contact* field or click *Add New Contact* to add one.
7. Click *Save Location and Contact to* see the information you added. (Ref. Fig. 6.6).

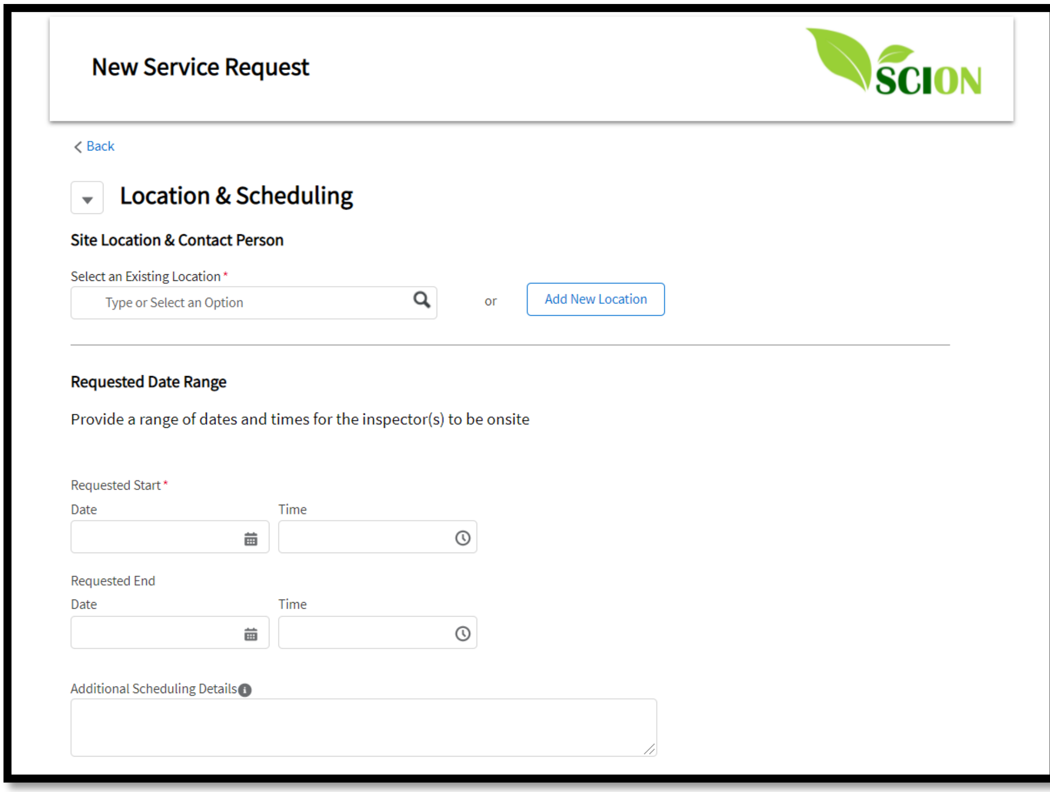


Figure 6.4: Location & Scheduling

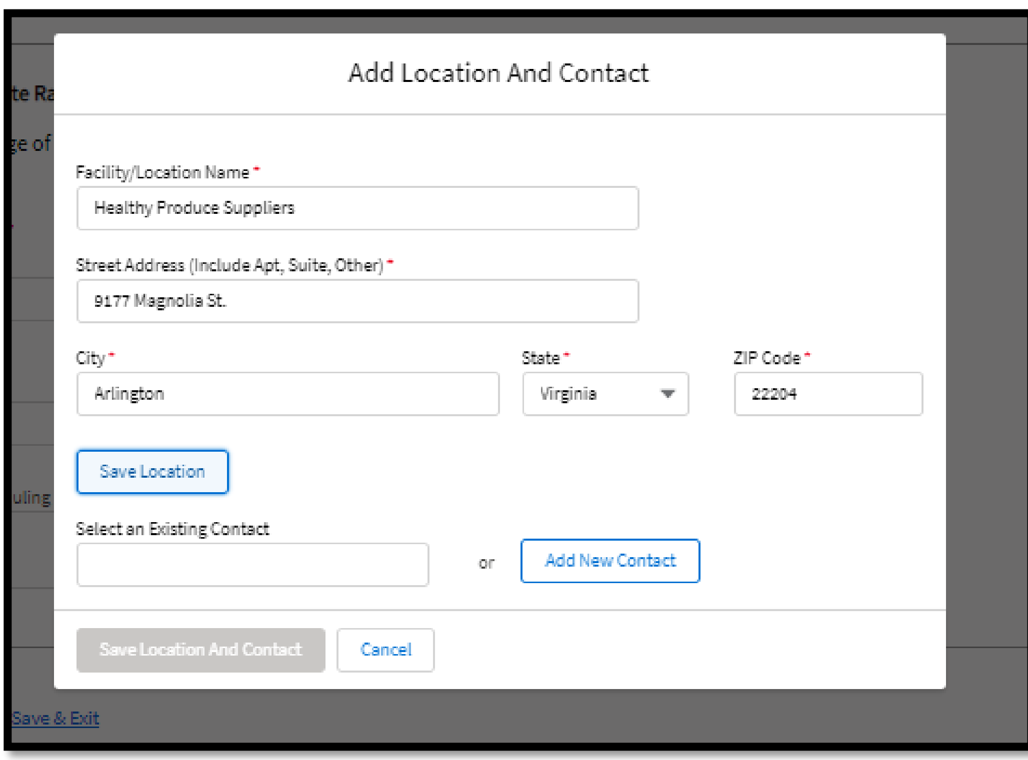


Figure 6.5: Adding Location and Contact/ Location & Scheduling

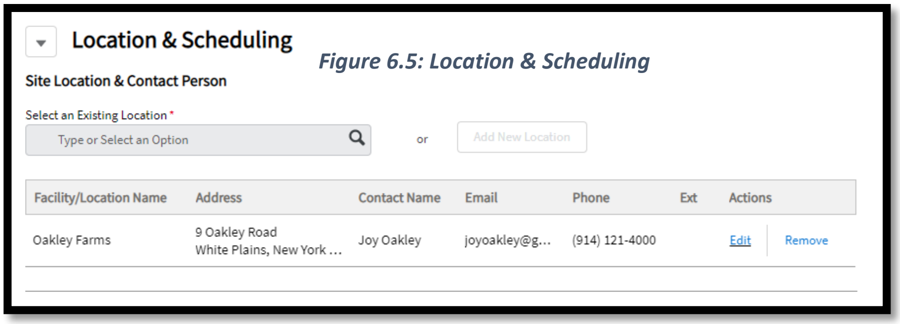


Figure 6.6: Site Location and Contact Information Section

8. Select dates for *Requested Start* and *Requested End* fields (Ref. Fig. 6.7).

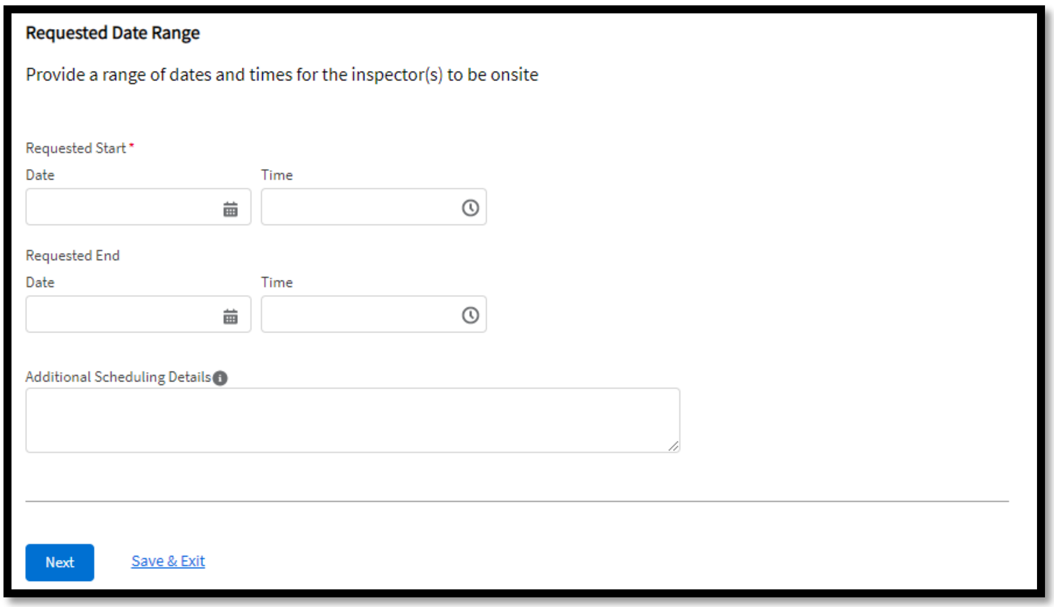


Figure 6.7: Requested Date Range

9. Add comments or additional information in the *Additional Scheduling Details* area, as needed.
10. Click *Next* to enter Product Details & Lot Information.
11. Indicate whether the lot was inspected previously.
    a. If you select Yes, provide requested information related to the lot's previous inspection, e.g., *Code Marks*, *Certificate Number*, *Previously Graded at* location, and *Additional Details* as needed.
    b. If you select No, no other information is required.
12. Click *Next*.
13. Click *Add a Lot* button and provide requested information. The fields *No. and Type of Container in Case* and *Lot Size and Description* are mandatory (Ref. Fig 6.8).
14. Click *Save* and you'll see your service request details.

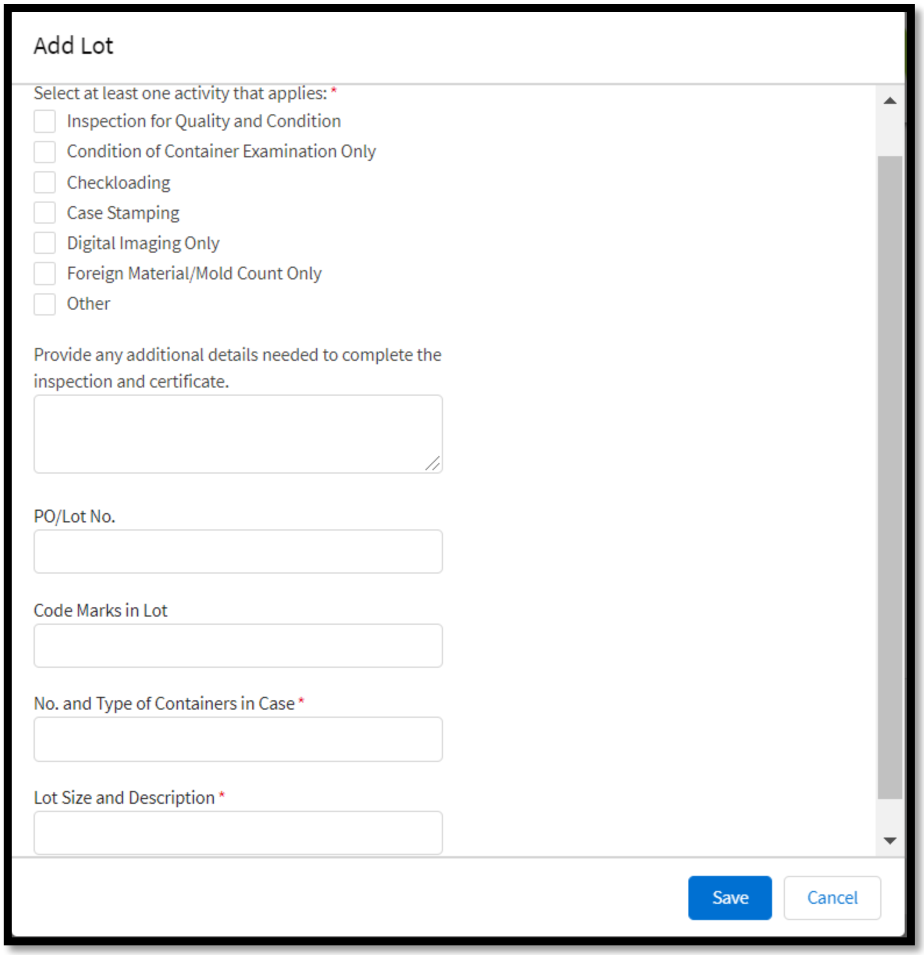


Figure 6.8: Add Lot Screen

15. Click *Upload Files* to upload any relevant documents (e.g. pictures or files)
16. Click *Next* to add Supporting Documentation.
17. Click *Upload Files* to upload any documents required as part of your service request (Fig. 6.9).
18. Click *Next* after uploading all relevant documentation.
19. If you do not upload documents, you'll see a *Continue Without Uploading* window warning.

20. Click *Cancel* to return to the Supporting Documentation screen or click *Next* to continue with your service request and go to Service Results and Billing screen.

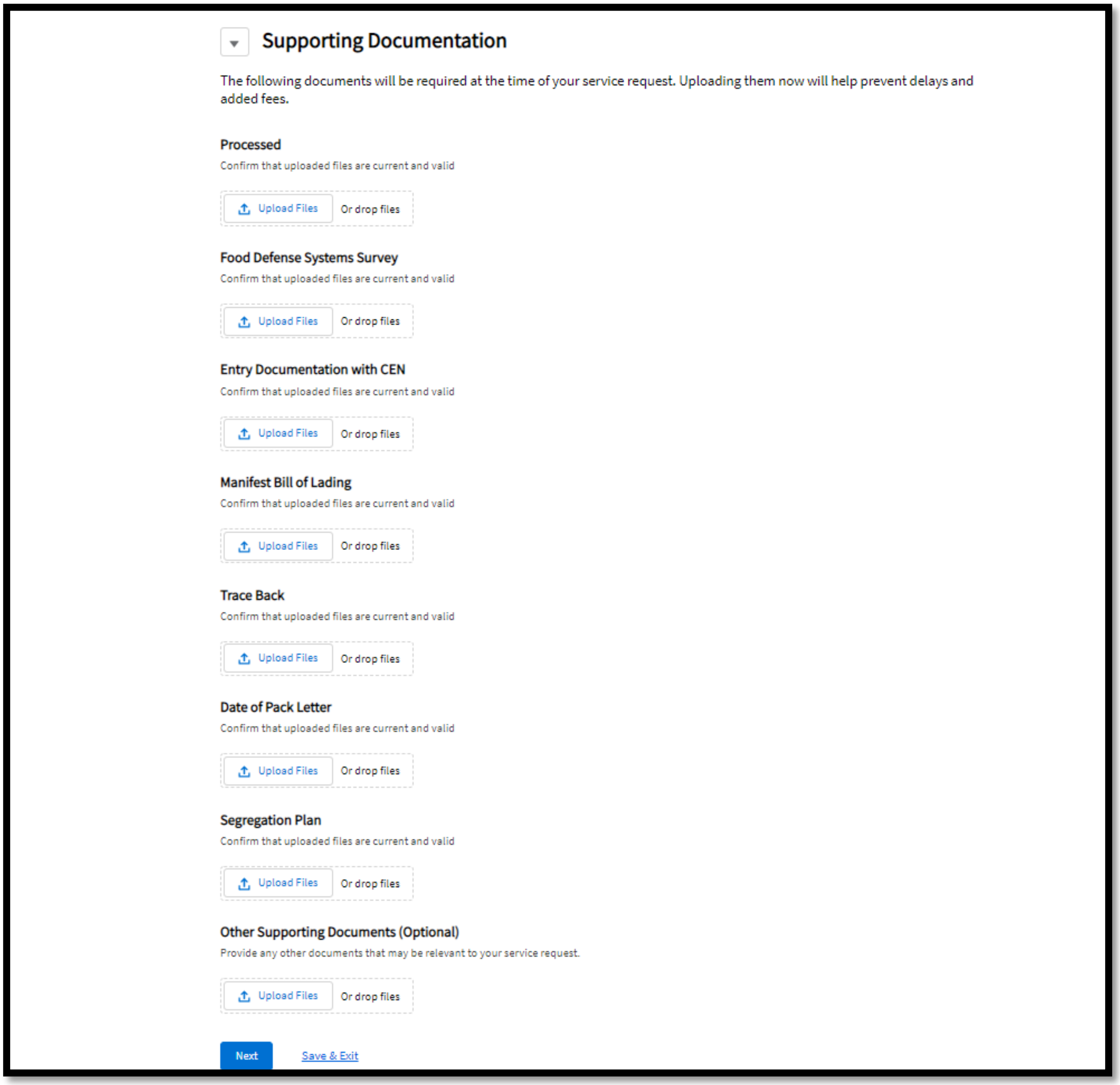


Figure 6.9: Supporting Documents.

6.2.4 Service Results and Billing

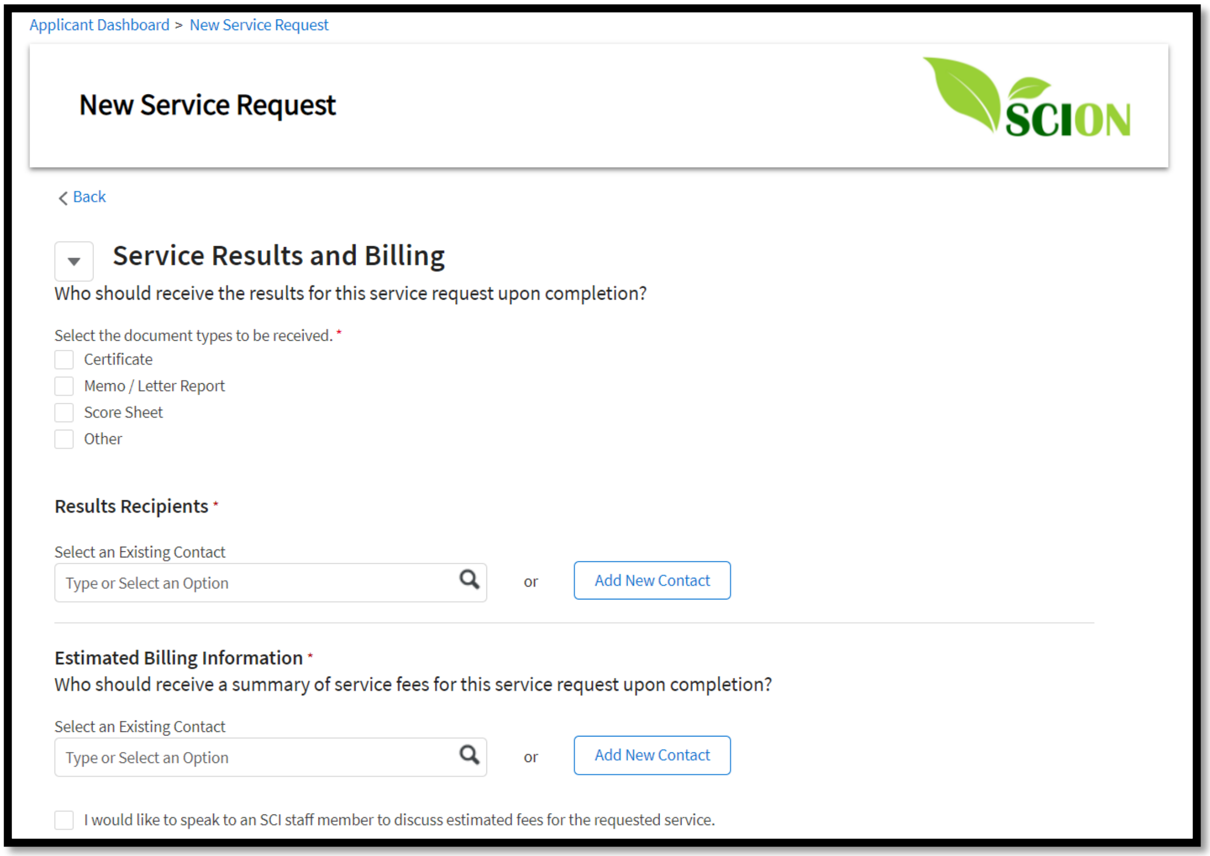


Figure 6.10: Service Results and Billings.

1. Select the document(s) you want to receive from SCI under *Select the document types to be received* (Ref. Fig. 6.10).
   - Certificate
   - Memo/Letter report
   - Score Sheet
   - Other

   If you select *Other*, enter a description of the document you want on the new *Describe the Required Service Results Document* field that will appear on the screen.

2. Select an existing contact or an add new contact in the *Results Recipient* section to designate inspection results recipient(s) (Ref. Fig 6.10).
3. Type the contact name in the *Search an Existing Contact* bar and click on a contact that appears in the dropdown.
   a. Click on the contact to open an *Add Service Results Contact* window.
   b. Select the mandatory fields, including *Role of Contact Person and Distribution Method*, and verify *First Name*, *Last Name*, and *Phone number*.

4. If the contact does not appear or it is a new contact, click *Add New Contact* and enter requested information.
5. Click *Save*.

6.2.5 Billing Contacts

1. In *Estimated Billing Information* section, designate who will receive the summary of service fees upon completion of the service request (Ref. Fig 6.10).
   a. For an existing contact, type the contact name in the *Search an Existing Contact* bar
      i. Click on the contact to open the Add Billing Contact window.
      ii. Click *Save.*
   b. Click *Add New Contact* to enter a new billing information recipient.
      ii. Complete the mandatory fields, including *Distribution Method*, and add *First Name*, *Last Name*, *Phone number*, and other requested details.
      iii. Click *Save*.
   c. Click *I would like to speak to an SCI staff member to discuss estimated fees for the requested services* if you would like to an SCI staff member to get in touch with you via your SCION contact information.

   Once your inspection results and billing information recipients contacts have been added, you will see a list of your contacts, including *Contact Name*, *Distribution*, *Shipping Label*, and *Actions*.

6.2.6 Submit Your Service Request

From your Contacts table, click *Next* to go to the *Review & Submit* screen*.*

1. Click *Submit* after reviewing the information you entered for the service request and SCI Terms and Conditions.
2. You will receive a confirmation message indicating the request was submitted and an SCI staff member will get in touch with you to schedule the requested service or if additional information is needed.
3. Click *Finish* to go back to your Dashboard.

6.3 Specific-Purpose Processed Commodity Lot Inspections

This section covers instructions for creating a service request for processed lot inspections that are for a specific purpose, e.g., Section 8e Import, Marketing Order, Export, Inspection for USDA Purchase(s), Inspection for State Order(s), Operational Rations, and Tomato Suspension Agreement.

Note: the process flow and steps for this section are almost identical to the information covered in Section 6.2, only few additional screens are completed to capture required information pertaining to the service requests.

You can click *Save & Exit* at any time when creating a new service request. If you click *Save & Exit*, your service request and all data entered to that point will be saved as a draft and be accessible to you via the Applicant Portal under Incomplete Service Requests.

1. Log into the SCION Applicant Portal (See Section 3 for details).
2. Click *New Service Request* (Ref. Fig. 6.0) on your Dashboard.
3. Enter *Name of Request.* This can be any name that you would like; you will use it to locate or identify the specific request.
4. Click *Lot Inspection* as the *Type of Request* (Ref. Fig. 6.1).
5. Select the specific purpose of your inspection in the dropdown menu.
6. Click *Processed* for the *Select type of commodity covered by the service request*.
7. Click *Next* to go to the Commodity Information screen.
8. Enter the commodity name in the *Type or Select Option* field.
9. Click *Add Commodity* to add the commodity you selected to the service request (Ref. Fig. 6.3).
10. Click *Next* to go to the Location & Scheduling screen.

6.3.1 Location & Scheduling

1. For an existing location, type the service location in the *Search an Existing Location bar.*
    a. Click the existing location in the dropdown (Ref. Fig 6.4).
2. In the *Add Location & Contact* window that opens:
    a. Select an existing contact, OR
    b. Click *Add New Contact button* to add a new contact.
    c. Click S*ave Location and Contact.*
3. To add a new location:
    a. Click *Add New Location* and enter the new facility/location name, including street address type and facility size, in the *Add Location and Contact* window (Ref. Fig. 6.5).
    b. Click *Save Location.*
    c. Select an existing contact from the *Select an Existing Contact* field, or click *Add New Contact* to add one.
    d. Click *Save Location and Contact.*

When you complete the *Site Location* and *Contact Person* section, you will see your location and contact information displayed on the *Location & Scheduling* screen (Ref. Fig. 6.6).

4. Select dates for the *Requested Start* and *Requested End* fields to request a time range for the inspector to be onsite.
5. Add any comments or additional information in the *Additional Scheduling Details* box, if needed.
6. Click *Next* to go to Additional Details screen.

6.3.2 Additional Details Screen

1. Complete all mandatory (denoted with an *) and required fields (Ref. Fig. 6.11):
    - Customs Entry Number (CEN)
    - Importer of Record
    - Country of Origin
    - Date of Arrival
    - Port of Export
    - Port of Entry
    - Name of Vessel
    - Voyage Number
    - Bill of Lading Number
    - Broker's Reference Number

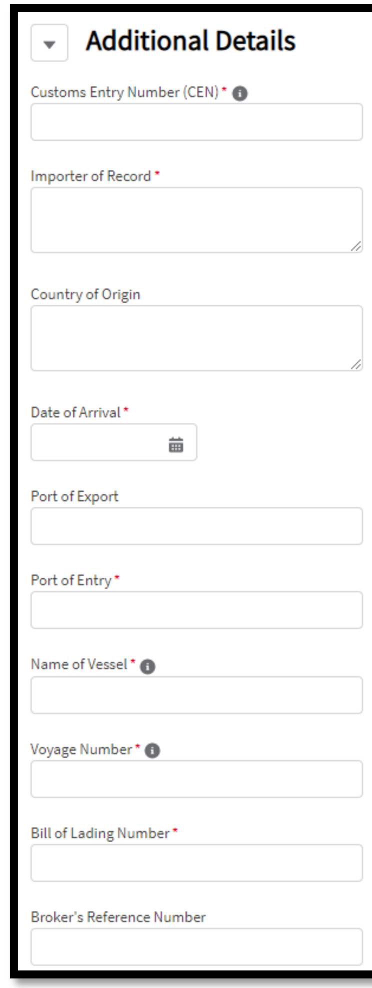


Figure 6.11: Additional Details Screen.

2. Click *Next* to go to *Product Details & Lot Information*.
    a. Indicate whether the lot was inspected previously.
        i. If you select No, no other information is required.
        ii. If you select *Yes*, provide requested information about the lot's previous inspection in the fields provided, e.g., *Code Marks*, *Certificate Number*, *Previously Graded at* location, and *Additional Details,* as needed.

1. Click *Add a Lot* button to enter information on at least one lot in the *Add Lot* window that opens. The fields *No. and Type of Container in Case* and *Lot Size and Description* are mandatory (Ref. Fig 6.8).
2. Click *Save* and you will see your service request.
3. Click *Upload Files* and select the documents you need to upload into SCION.
4. Click *Next* to go to the *Supporting Documentation* screen.
    a. Upload all required documents, e.g., *Entry Documentation with CEN*, *Manifest Bill of Lading*, or *Other Supporting Documents*.
5. Click *Next* after uploading your documents.
6. Once your documents are uploaded, you will see the *Service Results and Billing* screen (Ref. Fig. 6.12).

If you do not upload any documents, a window will appear with a warning message indicating that "*any missing documents may delay the completion of the service request.*"

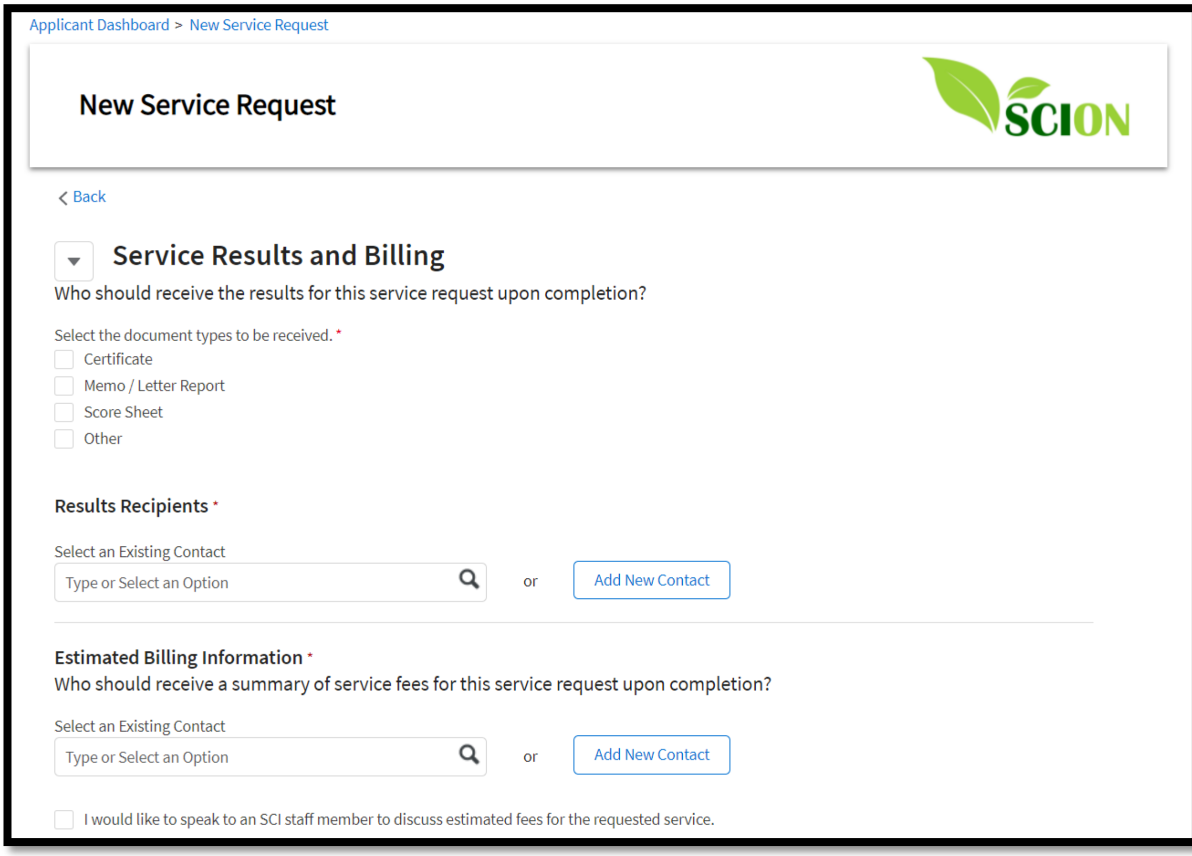


Figure 6.12: Service Results and Billings

7. Select the service results document(s) you want to receive from SCI, i.e., certificate, memo/letter report, score sheet, or other.
   a. If you select "Other," enter a description of the document you want in the *Describe the Required Service Results Document* box.
8. In the *Results Recipient* section (Ref. Fig. 6.12), designate who should receive the inspection results.
   a. For an existing contact, type the contact name in the *Search an Existing Contact* bar.
      i. Select the existing contact that appears in the dropdown suggestions.
      ii. Complete the mandatory fields (*Role of Contact Person*, *Distribution Method) and* verify *First Name*, *Last Name*, and *Phone number* of the contact in the *Add Service Results Contact* window that opens.
      iii. Click *Save.*
   b. To add a new contact, click *Add New Contact* to enter new mandatory fields such as the *Role of Contact Person*, *Distribution Method*, as well as verify *First Name*, *Last Name*, and *Phone* number, or any other pertinent details.

c. Click *Save*.

9. Designate who should receive the summary of service fees for completed service in the *Estimated Billing Information* section to designate (Ref. Fig. 6.12).
   a. For an existing contact, type the contact name in the *Search an Existing Contact bar* and select the existing contact that appears in the dropdown.
      i. Click the contact to open *Add Billing Contact* window.
      ii. Complete the mandatory fields, including *Distribution Method*, and verify *First Name*, *Last Name*, *Phone number*, and *Email*.
      iii. Click *Save.*
   b. To add a new contact, click *Add New Contact* and complete mandatory fields such as the *Distribution Method*, and verify *First Name*, *Last Name*, *Phone number*, and any other pertinent details.
      i. Click *Save*.

When the inspections results and the estimated billing information recipients contacts have been added, a table will appear on the screen with details such as the *Contact Name*, *Distribution*, *Shipping Label*, and *Actions*.

10. Click *I would like to speak to an SCI staff member to discuss estimated fees for the requested services* if you want an SCI staff member to get in touch via your SCION contact information.
11. Click *Next* to navigate to Review & Submit *screen.*
12. Click *Submit* after reviewing all the information you entered for the service request and SCI Terms and Conditions.
13. Review the confirmation message you receive that indicates your service request was submitted, and that an SCI staff member will contact you to schedule the requested service or in response to your request for contact.
14. Click *Finish* to return to your Dashboard.

7. View My Service Request

Your Dashboard shows three tables with information about service requests: *In-Progress Services*, *Completed Services*, and *Itemized Service Charges* (Ref. Fig. 7.0). The tables show the five most recent services for each respective category.

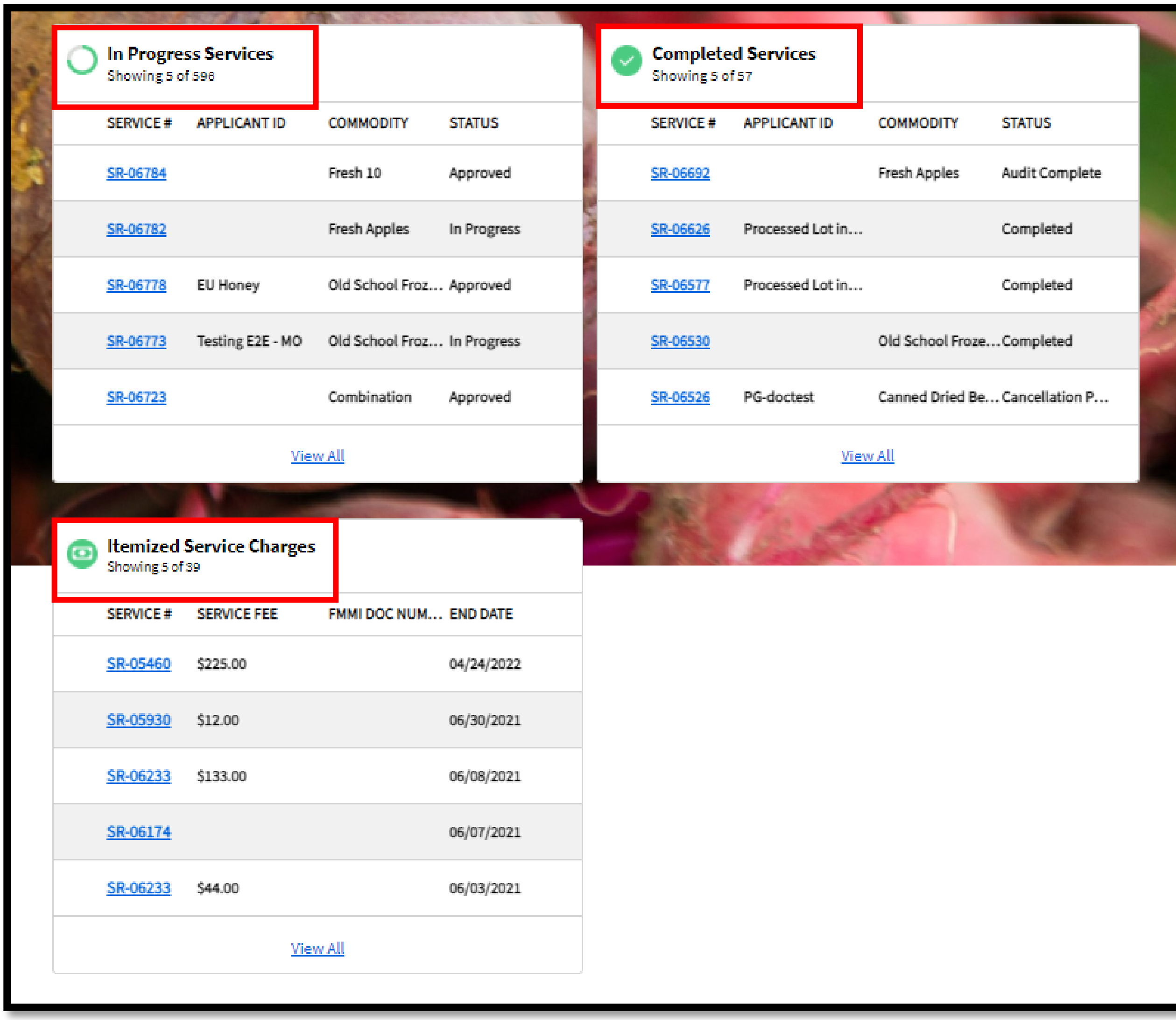


Figure 7.0: Dashboard Tiles

7.1 View Individual Inspection and Audit Service Requests

7.1.1 View Request Details

Here is how to view details about *In-Progress Services, Completed Services*, and *Itemized Service Charges* for any service request:

1. In any table, click the service request in the *Service#* column (indicated as *SR-XXXXX*) (Ref. Fig. 7.0).

OR,

2. If the service request was not one of the most recent five, click *View All* in the corresponding table to see all service requests, including details such as *Applicant ID*, *Date*, *Type* of service, and *Commodity*.
   a. To find a specific request, select a Date Range to view service requests in a given timeframe, or click the **>** symbol to navigate to see more requests.

3. Click the desired service request on the *Service#* column (indicated as *SR-XXXXX*) (Ref. Fig. 7.1).

4. Click the *Request Details*, *Outputs*, and *Service Fees* tab to see specific information about the service request (Ref. Fig. 7.2).

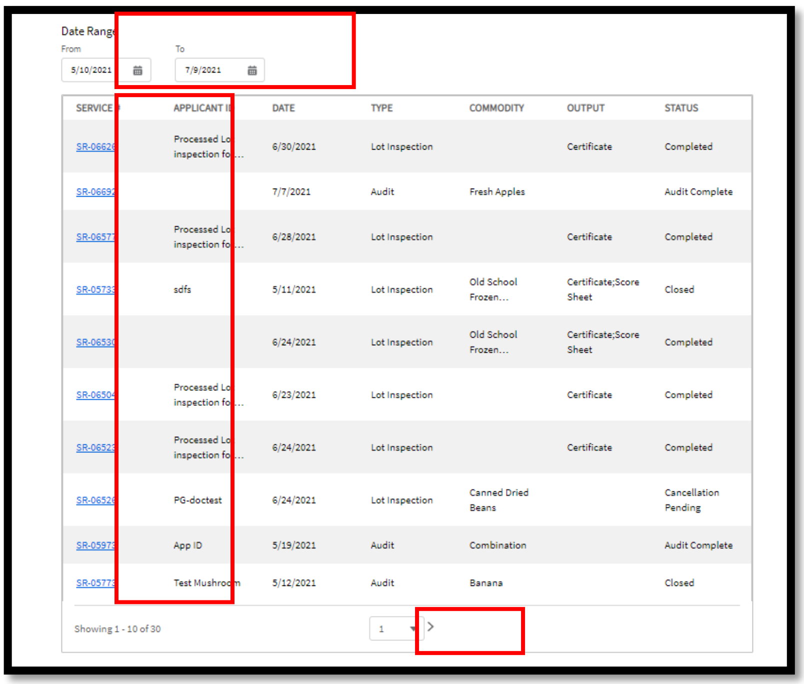


Figure 7.1: Service Request Details Table

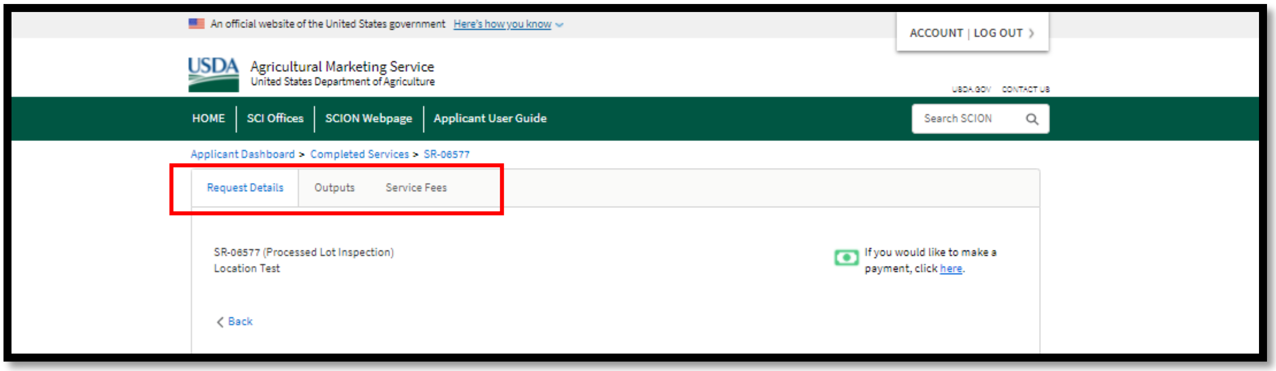


Figure 7.2: Request Details, Outputs, and Service Fees.

7.1.2 Request Details

1. Click on the *Request Details* tab (Ref.Fig.7.3) to review details such as *Goal*, *Inspection Information*, *Output Verification*, *Billing*, and *Related Documents*.
   a. Click *Edit* or *Add* Edit to amend information on this page.

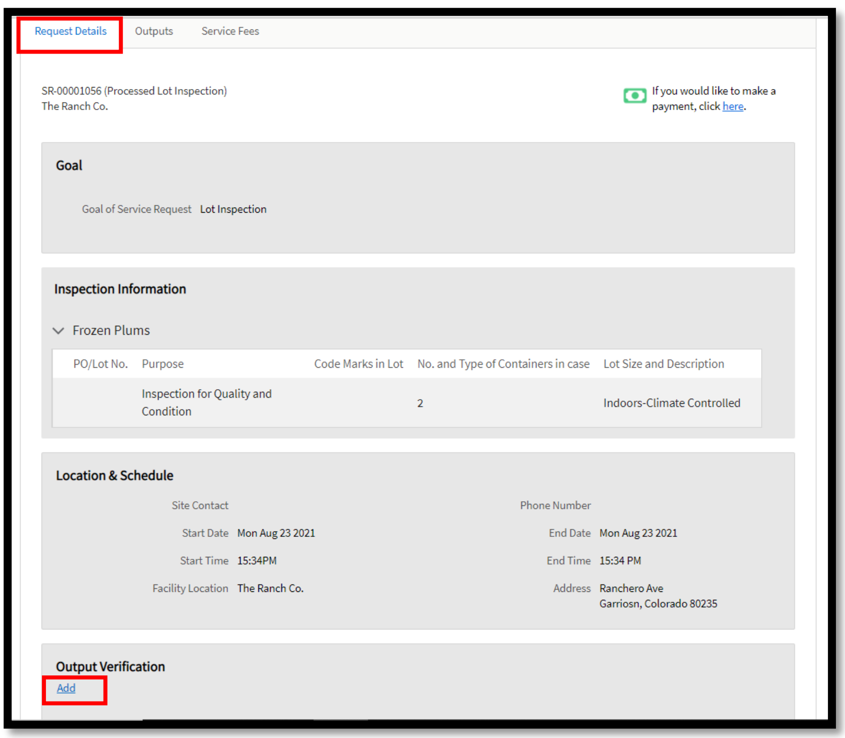


Figure 7.3: Request Details Screen.

7.1.3 Outputs (View Certificates)

The *Outputs* tab displays all available output documents for the service request, such as a scoresheet or certificate (Ref. Fig. 7.4). Here is how to get your output documents.

1. Click *View* under VIEW OUTPUTS to see details such as *Commodity*, *Service Date*, and *View Outputs*.
2. Click *Download* under OUTPUTS to view or download a certificate or related output document, such as a scoresheet.

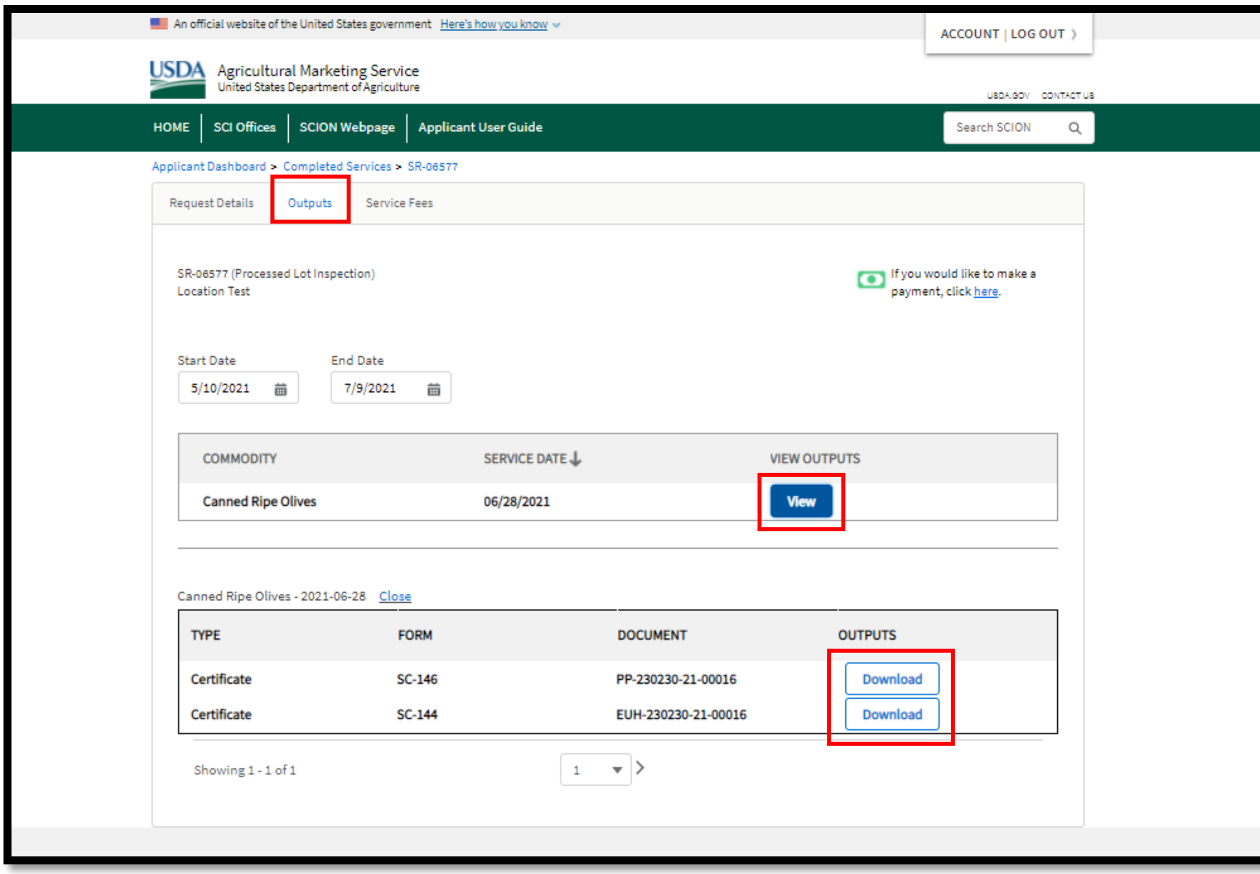


Figure 7.4: Request Details Screen.

7.1.3 Service Fees (Breakdown of Charges)

To view the service fees or a breakdown of charges:

1. Access the specific service request (See Section Sec 7.1.1).

2. Click *Service Fees* to see a breakdown of charges and details (Ref. Fig. 7.5).

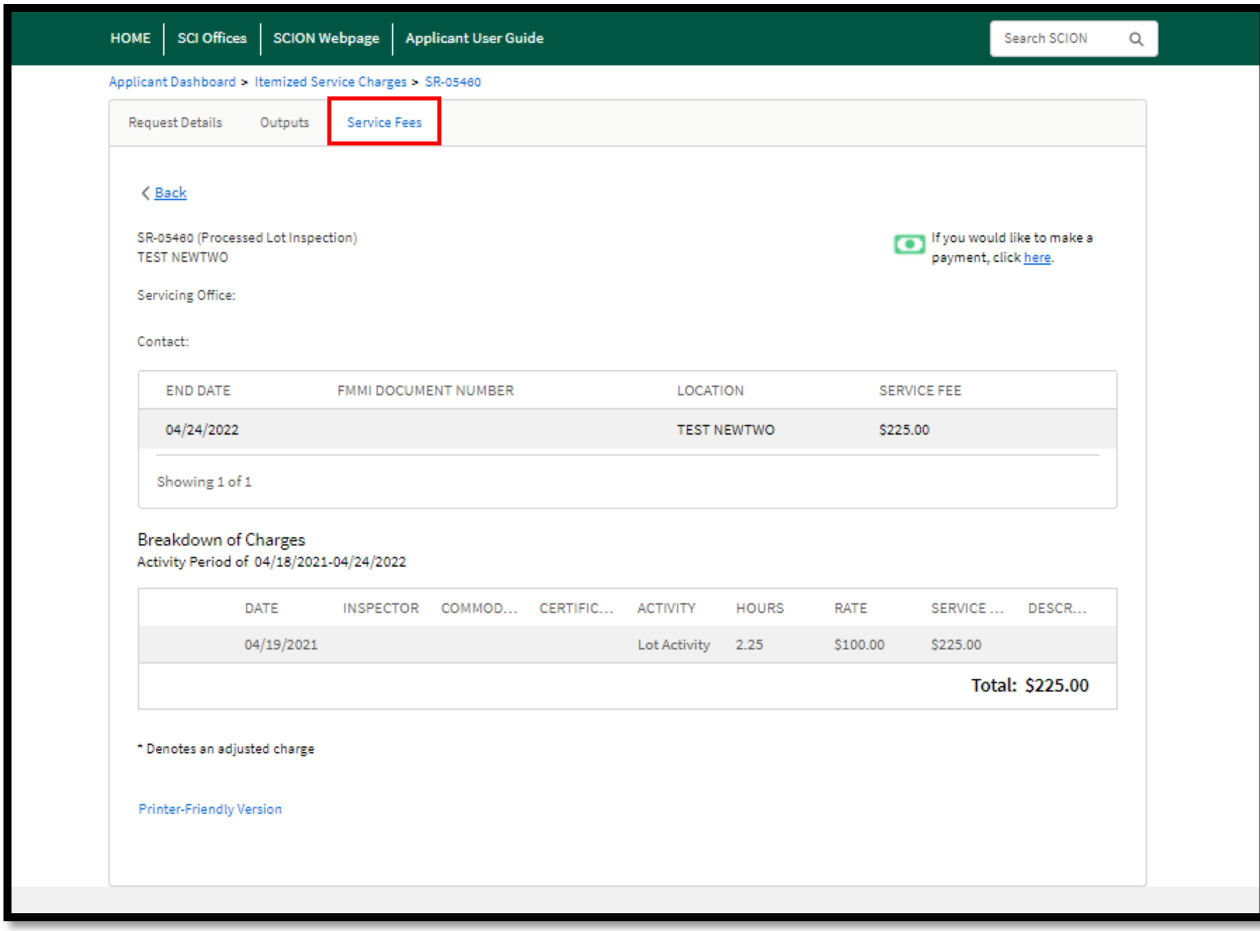


Figure 7.5: Service Fees.

OR

3. Click the specific service request in the Itemized Service Charge table on your Dashboard to see details of service fees.

8. Pay for Service

You can pay for completed services through Pay.gov, a secure Federal web-based application accepts payment by electronic check, credit card, or debit from your checking or savings account. Go to Pay.gov's Specialty Crops Collections page to make your payment.

The link for Pay.gov is on your Dashboard (Ref. Fig. 8.0) and on your service request details page.

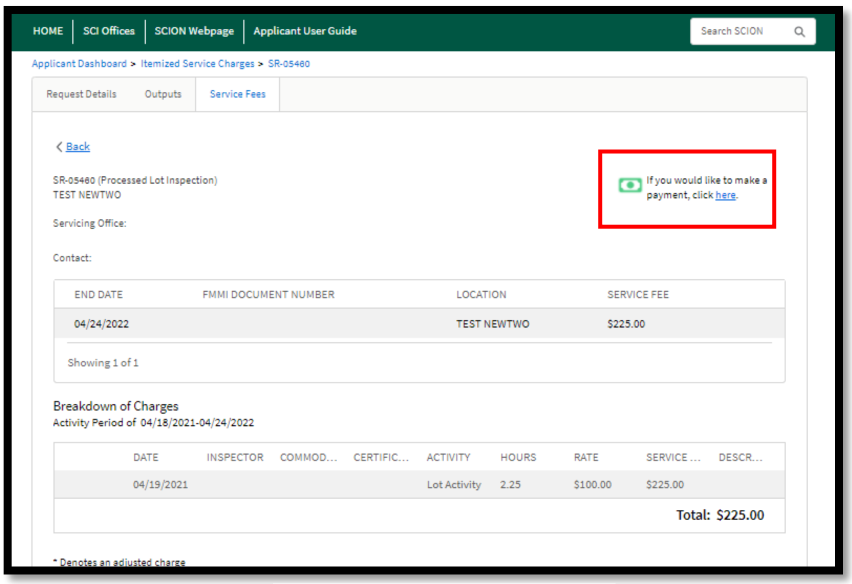


Figure 8.0: Pay.Gov Link

9. Glossary of Key Terms

SCION: SCION stands for Specialty Crops Integrated Operating Network. It is the name of the new software that connects Specialty Crops Inspection (SCI) Division and its customers (You) to manage inspection as well as audit service requests, certificates, audit reports, and service charges (Ref. Sec. 1).

Applicant Portal: Applicant Portal is the website or the application where you (the customer) can request services, upload supporting documents, review billing charges, and download certificates or other documents in one place. The Applicant's account details are stored in the platform and can be easily managed and updated (Ref. Sec. 1).

Dashboard: Dashboard is the Home page in the Applicant Portal to perform a number of actions very conveniently such as view your account (user) information, check the status of service requests, review service requests, access service results/billing information, or access Pay.gov link to make payments. (Ref. Sec. 4).

Executive Summary: Summarized list or table of Local Accounts (under a National Account) and their service requests' statuses. (Refer Sec. 4). This screen is only available in National Accounts.

eAuthentication: The website or government to portal that helps to create log-in accounts as well as log-in to various government websites including the Applicant Portal (Refer Sec. 2).

National Account: An account for the customers who request inspection services in multiple SCI Area offices across the country, have a single point of contact for inspection or billing purposes, and desire a single bill for all inspection services (Ref. Sec. 4).

Local Account: An account for the customers who request inspection services in a single SCI Area Office. This account type is also suitable for customers who may request inspection services in multiple SCI Area Offices, but do not have a single point of contact for inspection requests and billing purposes (Ref. Sec. 5).

Azzule: Azzule is a commercial database to which customers can elect to upload the results of their USDA GAP audit for a fee (Ref. Sec. 6.1.2.1).

Output: It is the reference to the tab within the service request details that consists of documents such as certificates, score sheets, audit reports etc. that can be accessed or downloaded (Ref. Sec. 7.1.3)

Pay.Gov: It is a secure Federal web-based application accepts payment by electronic check, credit card, or debit from your checking or savings account (Ref. Sec. 8).

APPENDIX A – SCI 3-Digit Office Identifiers

DC HQ	000

Area Offices

Boston, MA	004
Bronx, NY	011
New Jersey	037
Philadelphia, PA	012
Hunt Valley, MD	051
Winter Haven, FL	038
College Park, GA	002
Oshkosh, WI	218
South Bend, IN	063
San Antonio, TX	061
Yakima, WA	230
Stockton, CA	119
Fresno, CA	073
Los Angeles, CA	034

Sub-Offices

Richmond, VA	217
Miami Lakes, FL	056
San Juan, PR	098
Chicago, IL	006
Dallas, TX	027
Houston, TX	025
Salem, OR	244

Inspection Points

Hartford, CT	054
Portland, ME	077
Brooklyn, NY	072
Rochester, NY	215
Jessup, MD	001
Memphis, TN	017
Mankato, MN	219
St. Louis. MO	016
Cincinnati, OH	007
Hart, MI	210
Detroit, MI	010
Cleveland, OH	008
Pittsburgh, PA	013
Fort Worth, TX	223
Kansas City, MO	015
Little Rock, AR	062
Indio, CA	238
San Francisco, CA	035
Prunedale, CA	236
Burley, ID	243
Seattle, WA	046
Portland, OR	033