

Field Service Advisory Committee (FSAC) Meeting

March 15, 2011  
New Orleans, LA

1. Call to Order – Robert Albrecht, Chair, FSAC
2. Agenda Review and Repair
3. Minutes from 2010 FSAC Meeting (attached)
4. QCS Field Service Program Update – Steven Sievert, QCS
5. QCS Meter Center/Technician Program Update – Steven Sievert, QCS
6. New Business
  - a. Proposed Changes in Guidelines for Field Services
  - b. Proposed Changes in Guidelines for Meter Centers and Technicians
7. Recess
8. New Business (continued)
  - a. Action on proposed changes
  - b. Other new business
9. Election of FSAC Chair (2-year term, Robert Albrecht is eligible for FSAC re-election)
10. Adjourn

Field Service Advisory Committee (FSAC) Meeting

March 15, 2011

Intercontinental Hotel, New Orleans, LA

1. FSAC meeting called to order at 8:20 a.m. by Robert Albrecht, Chair
2. There were no additional agenda items brought from the floor.
3. Steven Sievert, QCS presented minutes from the September 22, 2010 FSAC Meeting. Minutes were approved as presented. Steven Sievert was appointed to take minutes for the 2011 meeting.
4. Field Services
  - a. Presentation (attached to minutes) by Steven Sievert, QCS Program Manager & Field Service and Meter Center auditor.
  - b. Proposed change in Auditing Guidelines for Field Services, page 8
    - i. 'For electronic meters checked via the statistical analysis method, this documentation may be in the form of a computerized spreadsheet, manual listing, or other organized system **and must demonstrate that the meters are operating within tolerance.**'
  - c. Discussion on guideline for validation of electronic ID system performance
5. Meter Center and Meter Technicians
  - a. Presentation (attached to minutes) by Steven Sievert, QCS Program Manager & Field Service and Meter Center Auditor.
6. Committee meeting recessed at 9:35 a.m.
7. Meeting reconvened at 2:15 p.m.
8. Motion to approve recommendation for statistical reports for EMM as presented.
  - a. **Recommendation to include 5% tolerance in the revision.**
  - b. M-S-P.
9. Discussion on proposal for EID system validation.
  - a. Steven Sievert presented sample language.
  - b. Motion to have the auditor present proposal to managers during field service audits, gain input and/or feedback, and present summary at next FSAC meeting. M-S-P.
10. No other new business.
11. Terry Hopper elected as FSAC Chair.
12. Adjourned at 2:55 p.m.

Recorded by:

Steven Sievert  
QC Program Manager/Field Service and Meter Center Auditor  
Quality Certification Services Inc.



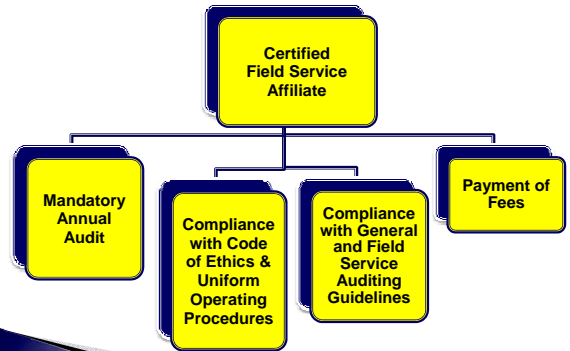
# QCS Field Service Update

Steven J. Sievert  
Manager, Quality Certification Services, Inc.  
Technical Director, National DHIA



Field Service Advisory Committee  
March 15, 2011

## Components of Field Service Certification



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## Observations – Initial Training

- Majority of the affiliates meet the minimum
- Training documentation is dated
  - *No updates to training programs since 2000-2003 – 75%*
  - *We need to provide the tools for technician to succeed*
  - *Most likely more training than reported to the auditor*
  - *QCS recognizes variances between affiliates – just document what training you provided*
- What support is needed?
  - *Forms? Presentations?*
  - *Other Resources?*



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## Observations – Continuing Education

- Majority of the affiliates meet the minimum
- Training is varied, reporting could be better
  - *Wide variety of meetings, workshops, conference calls*
  - *One-on-one training is okay if documented*
  - *Most likely more training than reported to the auditor*
  - *Don't forget about organizations/ISPs certified under you...*
- What is not appropriate?
  - *Golf or fishing outings*
  - *Going to a farm show to look at exhibits*



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## Need for Improvement – CE for Managers

- Number of Field Service Affiliate Managers do not attend any organized training
- Increases challenges/increases costs of support
  - *Not aware of industry changes*
  - *Higher non-compliance issues*
  - *Concern in both lab and field service sectors*
- *CE (Continuing Education) Task Force for Lab & Field Service Sectors*
  - *Input from Field Service & Lab Managers at present time*
  - *Presentation to LAC in Fall 2011*
  - *Proposal to all managers – lab and field service for approval*



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## Observations – Portable Meter Calibration

- Meters need to be calibrated at least every 12 months
- Many affiliates calibrate more often
  - *QCS can handle multiple calibration dates*
  - *Use the latest two dates for the interval*
- Helpful hints
  - *Don't forget to record meter center and technician*
  - *Don't forget second calibration checks when required*
  - *No alphanumeric numbers if possible*
  - *Use the manufacturer's serial number for QCS whenever possible*



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## Observations – Scale Calibration

- Scales need to be calibrated at least every 12 months
- Still seeing about 2,100 scales in active use
- Record all weight increments
  - 10, 20, 30, 40, 50 pounds required
  - If goat calibrations are in the file – no problem – QCS just hides those columns
- Guidelines require all new scales to be calibrated prior to being placed in service
  - Cheaper hanging scales may not be accurate.
  - Some affiliates have forgotten this aspect of the guidelines.

## Observations – Electronic Meter Reporting

- Electronic meters need to be calibrated every 12 months
  - Water Test Calibration
  - Parlor Report/EMMR/Manufacturer's Software Report demonstrating that meters are accurately weighing milk
- Many affiliates exceed the minimum
  - Monitor reports monthly or quarterly
  - Build value in DHI program by emphasizing accuracy in data for both management use and genetic research
  - Identify failing meters and target repair costs accordingly
- Myths about electronic meters
  - Will always be in calibration
  - DRPC will edit out the errors
  - A 10-day average takes care of all individual cow errors

## Proposed Change in the Guidelines

### Current Language – Electronic Meter Calibration

"For electronic meters checked via the standard water test method, this documentation may be in the form of a signed statement indicating that each electronic meter has been checked and is operating within tolerance.

For electronic meters checked via the statistical analysis method, this documentation may be in the form of a computerized spreadsheet, manual listing, or other organized system."

### Proposed Language – Electronic Meter Calibration

"For electronic meters checked via the standard water test method, this documentation may be in the form of a signed statement indicating that each electronic meter has been checked and is operating within tolerance.

For electronic meters checked via the statistical analysis method, this documentation may be in the form of a computerized spreadsheet, manual listing, or other organized system and must demonstrate that the meters are operating within tolerance."

## Observations – Member/Service Agreements

- Required for all herds
  - All test plans are included – even 40's and 70's
  - Data is used for genetic and management research
- Good business practice, even for non-processed herds
  - Herds may convert from non-processed to processed
  - Record of herd code assignment
  - Release and use of records
- Common Problems
  - Missing Agreements – forgot to get the agreement initially
  - Missing Signatures – especially Field Service Affiliate signature

## Discussion on EID System Validation

- **Monitoring of Electronic ID Systems**
    - ICAR approved protocol – test day policy handout
    - Recommend including in the Guidelines for Field Services
    - Reference the ICAR document instead of establishing our own rules
- Three options for field services
1. FS procedure based on ICAR test day policy
  2. FS procedure based on ICAR test day policy but modified to meet needs of individual dairy facilities or cow handling practices.
  3. FS Procedure demonstrating validation of accuracy of electronic ID system proposed by field service affiliate and approved by the auditor.

## **Quality Certification Services Inc.**

- Performance & Quality Standards
- Compliance Auditing of Providers
- Education, Training, & Development

A simple, yet vital mission....

Providing a reliable source of information to people interested in the U.S. dairy records industry.

## ***11.7.1 Test day policy utilizing proper recording practices when using electronic milk meters and electronic ID simultaneously***

### **11.7.1.1 Definition**

On test day, utilizing on-farm electronic milk meters with on-farm electronic identification (hereby addressed as ID) information, it has been substantiated numerous times that not all ID programs are complete, accurate and successful. Realizing that there are currently on-farm electronic milk metering devices standards that are in place it is the intent of this publication to substantiate the proper use and guidelines of electronic ID usage on test-day to give the most accurate and precise information possible for use in genetic evaluations and management practices.

### **11.7.1.2 Examples of proper recording systems/practices on test day**

First group of cows entering milking parlor all need to be visually identified and cross-referenced to the electronic ID system; henceforth two stalls are randomly selected to observe on each group to insure proper ID test day procedures – to substantiate verification of visual observation a paper trail or computer notebook protocol would be used to insure accuracy

First group of cows entering milking parlor all need to be visually identified and cross-referenced to the electronic ID system; henceforth every fifth group is visually identified to insure proper ID for test day procedures – to substantiate verification of visual observation a paper trail or computer notebook protocol would be used to insure accuracy

First group of cows entering milking parlor all need to be visually identified and cross-referenced to the electronic ID system; henceforth each first and last animal is visually identified to insure proper ID for test day procedures – to substantiate verification of visual observation a paper trail or computer notebook protocol would be used to insure accuracy  
It is advisable that if there are any misidentified animals then proper notification needs to be made to the dairy producer as to the problem discovered and the entire test day needs to be completed using visual identification until the problem is corrected

### **11.7.1.3 Validation**

It is advisable the electronic ID system should have inbuilt validation checks/software to ensure each row has the correct cow sequence. Such checks would include but not limited to:

“Cross out” check - in the event cow A is “read” by sensor but withdraws her head and is “passed out” by another cow B, then when cow A enters properly the sequence is corrected....

“Random Check” – the system can be programmed on recording day so that the electronic system selects a % of units at random on each row for checking – operator must verify cow at the selected units (accept button) and only when all selected units are “accepted” is the row allowed out....

“Narrow Entrance funnel” – as most errors occur at entry-gate to row, it is advisable for parlor installations to have entrance funnel of “one cow length” thereby distancing the jostling activity from sensors.

*Note – experts from manufacturers should be consulted here to decide and agree on the best way to “build” quality checks into the system.*

## ***11.7.2 Test day policy utilizing proper recording practices when obtaining milk samples on individual animals***

### **11.7.2.1 Definition**

On test day, various sample vial recordings are used in the world-wide marketplace that adhere to proper test day procedures; however as has been identified by various entities, shortcuts are being made that limit proper identification of samples with individual cows on test day. With the milk sample platform being used for disease, genetics, DNA, and health tests along with the routine component test day requirements it is essential that all milk samples collected on test day be properly identified to the corresponding animal that it is collected from using proper collecting procedures.

### **11.7.2.2 Examples of proper recording of sample vials on test day**

Each animal is recorded on sample vial with name or number corresponding to animal ID that is used on-farm that corresponds with proper laboratory practice procedures

Each animal is recorded on sample vial using bar graph information systems that corresponds with proper laboratory practice procedures

Each animal is recorded on sample vial via RFID chip installed or embedded within the sample vial that corresponds with proper laboratory practice procedures

It is advisable that every sample vial is properly identified with the corresponding correct cow ID in whatever system is approved for proper usage that will follow proper laboratory practice procedures

# QCS Meter Center & Technician Update

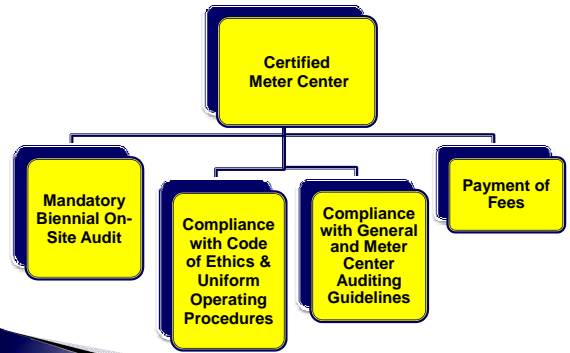


Steven J. Sievert  
 Manager, Quality Certification Services, Inc.  
 Technical Director, National DHIA



Field Service Advisory Committee  
 March 15, 2011

## Components of Meter Center Certification



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## General Auditing Guidelines

- Service providers are required to notify the auditor of:
  - Changes in business name, address, phone, email, contacts
  - Changes in authorized personnel – i.e. meter technicians
  - Changes in equipment/instrumentation
- Notification within 30 days of change
- Send changes to QCS Program Manager – Steven Sievert
- Assures accuracy in billing, website listings, and monitoring instrument performance
- Allows for cost-efficient scheduling of on-site discretionary audits



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## General Observations from Meter Centers

- Equipment is aging in many meter centers
  - Vacuum pumps/gauges are failing (4 in 2010)
  - Receiver jars showing some age – air leaks, etc.
  - Scales are inaccurate (5 in 2010, 1 in 2011 so far)
  - Care and maintenance of wands and scales is poor
- Meter centers carrying excess parts inventory – especially for meters no longer in service – *do you have parts that would be useful to another meter center?*
- Failure to replace ‘annual’ service kits – *spending money on unnecessary repairs instead*



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## Portable Meters Currently In Use

### MONTHLY METERS

MAKE	MODEL	COUNT	PERCENT	COUNT	PERCENT
FOSS	MILKO-SCOPE	224	0.21		
	<b>SUBTOTAL</b>			224	0.21
TESA	MILK-O-METER	168	0.16		
	<b>SUBTOTAL</b>			168	0.16
TRU-TEST	AUTO SAMPLER	FV	25,114	23.39	
	ECONOVALVE	EC	2,934	2.73	
	ELECTRONIC	EMM	528	0.49	
	EZI-TEST	EZ	8,123	7.57	
	FARMER	F	6,845	6.38	
	PULLOUT	HF	51,136	47.53	
	<b>SUBTOTAL</b>			94,680	88.18
WAKATO	MK V	MKV	12,013	11.19	
	SPEEDSAMPLER	SS	284	0.26	
	<b>SUBTOTAL</b>			12,297	11.45
	<b>TOTAL</b>	107,369	100.00	107,369	100.00



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## Tru-Test Farmer and Econo-Valve



- Only standard bore models
- Over 20 years old
- Limited parts availability
- Poor image of DHI in some dairyman's opinion
- Still approved



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## Tru-Test Pull-Out - Maintenance



- ▶ Replace VSO at least once per year
- ▶ Replace gasket on cap yearly
- ▶ Do not over-tighten the flask foot
  - Places stress on meter body
  - Air leaks in flask plug
- ▶ New laser-etched flasks – do not use flask tapes on flasks for WB meters

## Tru-Test Ezi-Test - Maintenance



- ▶ Annual Service Kit
  - Gaskets
  - Valve Assembly
- ▶ Broken baffle in valve
  - Will calibrate
  - Poor mixing and washing
- ▶ Plastic T-Piece
  - Easily broken
  - \$18.88 repair
- ▶ Store with valve in Milk Position

## Tru-Test Auto-Sampler - Maintenance



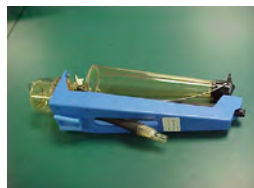
- ▶ Service kit replacement
  - Valve, cap
  - Sampler button
- ▶ Check sampler function and hoses (punctures)
- ▶ Higher cost of ownership
  - Multiple service kits
  - Cap, sampler, valve and body damage

## Tru-Test Ezi-Test and Auto Sampler Valves



- ▶ New stronger valves in 2010
- ▶ Must replace whole valve
- ▶ Dark charcoal in color
- ▶ 2<sup>nd</sup> generation grommet – tan in color
- ▶ Should reduce broken wash baffle issue

## Waikato MK V



- ▶ Same mode of operation as Ezi-Test
- ▶ Annual Service Kit
- ▶ Don't forget to replace inlet hoses
- ▶ Durable
- ▶ Do not cut the tap for quicker sampling – affects mixing and accuracy

## Foss Milko-Scope



- ▶ Works on volumetric principle – same as Waikato and Tru-Test
- ▶ Limited parts availability
- ▶ Still approved and preferred by those technicians using them



## Changes in Auditing Guidelines

- None proposed or viewed as critical
- Approved in 2011
  - Meter center is required to use a manufacturer's wand or approved closed jar-to-jar system
  - Implementation on January 1, 2012
  - Tru-Test offers stainless steel 'fast-flow' calibration wand
  - Waikato and QCS met in August 2010 on development of stainless steel 'standard-flow' calibration wand – completed and now available

## New Standard Flow Calibration Wand

- Waikato and QCS met in August 2010 on development of stainless steel 'standard-flow' calibration wand
- Works with Tru-Test pail and existing mounting brackets
- Includes restrictor, air admission orifice
- For all standard flow and dual-meter calibration procedures
- Required by January 1, 2012
- Available from Waikato Milking Systems USA
  - Part number 81380021
  - \$110.80 plus shipping

## TeSa Milk-o-Meter Update

- Still 168 in active service at last meeting
  - All TeSa Milk-o-Meters have been removed from service on December 14, 2010
- No longer approved after December 31, 2010
- If an affiliate and/or field technician is found using non-approved meters, all herds using those portable meters will be marked as 'not meeting QC – code 3'

## Unapproved DHI Meters



## Future Meter Technician Training Schools

### 2011

- Hosted by Mid-South Dairy Records
- Most likely May 25-27, 2011

### 2012

- Proposal from Holstein Mexico to host
- Held in Queretaro, Mexico
- Bilingual instruction
- Most likely in early December – coincide with National Holstein show

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