

**Taxonomy and Natural History of Southern Appalachian  
Mayflies, Stoneflies, and Caddisflies**

**Session 1: 15–26 June 2020**

**or**

**Session 2: 29 June–10 July 2020**

**SYLLABUS**

**COURSE DESCRIPTION:** Natural history and taxonomy of mayflies (Ephemeroptera), stoneflies (Plecoptera), and caddisflies (Trichoptera), including systematics, ecology, and behavior of larvae and adults, with emphasis on those aspects important in ecological studies, biological monitoring of water quality, and sport fishing. Insects will be collected from mountain stream habitats, and identifications will be done in the laboratory.

**Prerequisites:** Students are expected to have prior training in zoology, but not necessarily entomology.

**OBJECTIVES:** To learn

- (1) the literature, characters, and methods for identification of EPT larvae (at least to genus) and adults (at least to family);
- (2) morphological, physiological, and behavioral modifications for life in the water;
- (3) life history characteristics and habitat preferences of the different EPT groups;
- (4) a variety of qualitative and semi-quantitative collecting techniques appropriate for the biological monitoring of water quality.

**INSTRUCTOR:** J.C. Morse (864-656-5049, [jmorse@clermson.edu](mailto:jmorse@clermson.edu))

**LECTURES:** All lectures will be 50 minutes in duration.

**LABORATORIES:** All scheduled laboratories and field trips will be 180 minutes. The instructor will be available to assist with identifications on weekdays for as long as he is needed.

**COLLECTION:** Each student will be responsible for submitting an identified collection of EPT larvae. A collection of at least 60 correctly identified and curated genera (larvae) and families (adults) will be evaluated as "Excellent." Specimens will be collected during scheduled field trips and on students' personal time; identification and curation of specimens will be accomplished during laboratory sessions and on students' own time.

**EVALUATION:** Student evaluation will be based 50% on a final written and practical examination, 50% on the collection.

**REQUIRED TEXTS:**

Merritt, R.W., K.W. Cummins, and M.B. Berg, editors. 2019. *An Introduction to the Aquatic Insects of North America, 5<sup>th</sup> Edition*. Kendall/Hunt Publishing Company, P.O. Box 539, Dubuque, Iowa 52001. Available from

<https://he.kendallhunt.com/product/introduction-aquatic-insects-north-america>

[The FIFTH EDITION of this book enables identification of genera of both the aquatic and aerial forms of the freshwater insects in North America and includes updated ecological tables.]

Morse, J.C., W.P. McCafferty, B.P. Stark, & L.M. Jacobus, Editors. 2016. *Larvae of the Southeastern USA Mayfly, Stonefly, and Caddisfly Species. Biota of South Carolina. Vol 9.* PSA Publishing, Clemson University, Clemson, South Carolina, USA. 482 pp. Available from [https://secure.touchnet.net/C20569\\_ustores/web/store\\_cat.jsp?STOREID=168&CATID=298&SINGLESTORE=true](https://secure.touchnet.net/C20569_ustores/web/store_cat.jsp?STOREID=168&CATID=298&SINGLESTORE=true)

#### EQUIPMENT AND SUPPLIES:

Provided by Highlands Biological Station

Microscope - With magnification of 6.7 to 80 X.

Light source - Incandescent.

Alcohol preservative.

**Because you are more likely to be familiar with their operation and peculiarities, you may prefer to bring your own dissecting microscope and light source.**

Provided by Clemson University or Highlands Biological Station

Watch glasses.

Kick screens.

Benthic nets.

White pans.

Brass sieves - #10 and #30.

Vials (but see note below)

Notebooks (providing PowerPoint lectures and supplemental information).

Provided by Student (in additional to required texts)

(1) Waders or sturdy wading shoes suitable for kicking stones (felt-covered soles help prevent slipping on slick rocks but newer alternatives that do not spread fish diseases are reportedly now available and recommended)

(2) Field-collecting forceps (sturdy, fine point, cheap) (e.g., fine-point, straight-tip, stainless-steel forceps, 115 mm long, BioQuip [http://www.bioquip.com/html/view\\_catalog.asp](http://www.bioquip.com/html/view_catalog.asp) , page 30, Catalog Number 4731). (A lanyard or float attached to these forceps will help prevent losing them in the water.)

(3) Very fine-point laboratory forceps (2 pairs recommended: 11–13.5 cm long, with “biologie” to very fine tips (0.10X0.06 mm to 0.05X0.01 mm) (e.g., Dumont SS Forceps—Dumoxel-Biologie, Fine Science Tools <http://www.finescience.com/commerce/catalog/srhkeyword.cz;jsessionid=2382C7F0BCDCCF34B9E3D69FB4CDC9C1> , Catalogue Number 11200-33).

(4) Very fine-point, indelible-ink pen (for writing labels) (e.g., Pigma pen, black, 0.2 mm #005, available at art supply stores or at BioQuip [http://www.bioquip.com/html/view\\_catalog.asp](http://www.bioquip.com/html/view_catalog.asp) , page 34, Catalog Number 1154E).

- (5) Vials (optional, see below)
- (6) Any other equipment/supplies you have found useful for collecting or identifying aquatic insects.

#### VIALS:

Vials for student collections will be provided, if desired. Those students for whom vials are provided will contribute their collections to the Clemson University Arthropod Collection and the Highlands Biological Station Nature Center.

Students who provide their own vials will be able to retain most of their collections (up to 7 specimens may be kept by the CUAC and the HBS Nature Center).

If your laboratory has not yet begun maintaining a voucher collection, this will be a good opportunity to initiate this legally and scientifically significant resource. The Clemson University Arthropod Collection stocks and uses archival-quality vials: 4-dram screw-cap vials, each cap with a conical polyethylene liner that fits inside the lip of its vial, and recommends this style for permanent, archival storage of alcohol-preserved specimens [e.g., BioQuip [http://www.bioquip.com/html/view\\_catalog.asp](http://www.bioquip.com/html/view_catalog.asp) , page 17, Catalog Number 8804P for the vials and caps; ordered by the gross (= a dozen dozen) for a discounted price of US\$86.64/gross (i.e., US\$7.22/dozen X 12).] Other types of seals on the vials either allow evaporation or introduce specimen-damaging chemicals into the alcohol.

#### COURSE OUTLINE:

Freshwater biotopes, habitat type, river continuum concept.

How to collect and preserve larval mayflies, stoneflies, and caddisflies (Ephemeroptera, Plecoptera, and Trichoptera = EPT) and other aquatic insects.

DNA Barcoding and Barcode of Life Database (BOLD) (optional)

Insect morphology and special adaptations for aquatic life.

Orders of aquatic insects.

Evolution and natural history of mayflies (Ephemeroptera).

Identification of larvae of Ephemeroptera families.

Identification of larvae of southeastern Ephemeroptera genera.

Evolution and natural history of stoneflies (Plecoptera).

Identification of larvae of Plecoptera families.

Identification of larvae of southeastern Plecoptera genera.

Evolution and natural history of caddisflies (Trichoptera).

Identification of larvae of Trichoptera families.

Identification of larvae of southeastern Trichoptera genera.

Using Rapid Bioassessment Protocols and an EPT Index to monitor for pollution of southeastern streams.

**Taxonomy and Natural History of Southern Appalachian  
Mayflies, Stoneflies, and Caddisflies  
Highlands Biological Station**

**Session 1: 14–26 June 2020**

**or**

**Session 2: 29 June–10 July 2020**

Instructor: John C. Morse, Clemson University

**SCHEDULE:**

Also, one night of light trapping for adult EPT will be arranged, considering optimal weather conditions.

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|------|------|---------------|--|
| Mon  | 0830 | Lecture I:    | Introductions, course objectives, schedule, evaluation procedures.<br>Freshwater biotopes, habitat type, river continuum concept.                      |
|      | 1000 | Lecture II:   | How to collect and preserve larval mayflies, stoneflies, and caddisflies (Ephemeroptera, Plecoptera, and Trichoptera = EPT) and other aquatic insects. |
|      | 1300 | Field Trip:   | Collecting EPT in an Appalachian third-order stream (East Fork Overflow Creek).  |
| Tue  | 0800 | Lecture III:  | Insect morphology and special adaptations for aquatic life.  |
|      | 1000 | Lecture IV:   | Orders of aquatic insects.   |
|      | 1300 | Laboratory:   | Insect morphology and diagnosis of orders of EPT larvae.   |
| Wed  | 0800 | Field Trip:   | Collecting EPT in a fifth-order stream (Chattooga River).  |
|      | 1300 | Lecture V:    | Evolution and natural history of mayflies (Ephemeroptera).   |
|      | 1430 | Lecture VI:   | Identification of larvae of Ephemeroptera families.  |
|      | 1600 | Laboratory:   | Identification of larvae of Ephemeroptera families.  |
| Thur | 0800 | Lecture VII:  | Identification of larvae of southeastern Ephemeroptera genera.   |
|      | 1000 | Lecture VIII: | Identification of larvae of southeastern Ephemeroptera genera and of adults of families.   |
|      | 1300 | Laboratory:   | Identification of larvae of southeastern Ephemeroptera genera and of adults of families.   |

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|------|---------|---------------|--|
| Fri  | 0800    | Field Trip:   | Collecting EPT in a fourth-order stream (Whitewater River).  |
|      | 1300    | Lecture IX:   | Evolution and natural history of stoneflies (Plecoptera).  |
|      | 1430    | Lecture X:    | Identification of larvae of Plecoptera families.   |
|      | 1600    | Laboratory:   | Identification of larvae of Plecoptera families.   |
| Sat  | 0800    | Laboratory:   | Identification of collections.   |
|      | 1300    |               | Personal time: The laboratory will be open to enable course participants to collect and identify specimens.                            |
| Sun  | All day |               | Personal time. The laboratory will be open to enable course participants to collect and identify specimens.                            |
| Mon  | 0800    | Field Trip:   | Collecting EPT in a third-order stream (East Fork Chattooga River) and a first-order stream source (unnamed tributary of Wash Branch). |
|      | 1300    | Lecture XI:   | Identification of larvae of southeastern Plecoptera genera.  |
|      | 1430    | Lecture XII:  | Identification of larvae of southeastern Plecoptera genera and of adults of their families.  |
|      | 1600    | Laboratory:   | Identification of larvae of southeastern Plecoptera genera.  |
| Tue  | 0800    | Lecture XIII: | Evolution and natural history of caddisflies (Trichoptera).  |
|      | 1000    | Lecture XIV:  | Identification of larvae of Trichoptera families.  |
|      | 1300    | Laboratory:   | Identification of larvae of Trichoptera families.  |
| Wed  | 0800    | Lecture XV:   | Identification of larvae of southeastern Trichoptera genera.   |
|      | 1000    | Lecture XVI:  | Identification of larvae of southeastern Trichoptera genera and of adults of their families.   |
|      | 1300    | Laboratory:   | Identification of larvae of southeastern Trichoptera genera and of adults of their families.   |
| Thur | 0800    | Field Trip:   | Using Rapid Bioassessment Protocols and an EPT Index to Monitor for pollution of southeastern streams (Ravenel Lake outflow).          |
|      | 1300    | Lecture XVII: | Using Rapid Bioassessment Protocols and an EPT Index to Monitor for pollution of southeastern streams.                                 |

- 1430 Laboratory: Identification of larvae and adults of southeastern EPT.
- Fri 0800 Examination (1): Closed-book examination on lecture information and reading assignments.
- 0900 Examination (2): Practical, open-book identification of Southern Appalachian EPT larvae to genus [or optional SFS Taxonomic Certification Program Level 2 (genus-level), Eastern Group 2 (EPT) examination – Participants must register separately for this option at least 10 days before Exam day [registration at <https://stroudcenter.org/sfstcp/exam/> or <https://stroudcenter.org/sfstcp/exam/schedule/>].
- Collection submission.
- 1200 Departure: Course Participants.
- 1300 Examination: SFS Taxonomic Certification Program Level 2 (genus-level) Exam. This examination will be provided for anyone, including persons who did not undertake the EPT course, but who wish to attempt certification for any Group. Examinees must register for this option at least 10 days before Exam day [registration at <https://stroudcenter.org/sfstcp/exam/> or <https://stroudcenter.org/sfstcp/exam/schedule/>].
- 1600 Departure: Second SFS Certification Exam Participants.