Shayla Bailey: Hello and welcome to the Food Safety and Inspection Services October webinar on PHIS updates. My name is Shayla Bailey, and I will be your FSIS moderator. During this event, we will specifically cover the updates to establishment profiles with the PHIS 15.4 relief. Before we get started with the formal agenda, I want to take a moment to go over a few housekeeping items. We have set aside a lot of time at the end of the presentation for questions and comments, so please feel free to use the chat to ask questions along the way, and I will read them for you once we get to the Q&A portion of our event. You will also be able to use pound two to ask a question via phone or raise your hand using the WebEx platform, and we'll call on you at that point. And now I'm happy to introduce Dr. Phil Bronstein to get us started with our formal agenda, Phil.

Phil Bronstein: All right, thanks Shayla, and hello everyone. I'm Phil Bronstein. I'm the assistant administrator for our Office of Field Operations in the Food Safety and Inspection Service. And I really want to welcome everyone to our webinar today, which is going to highlight our newest enhancement to our public health information systems or PHIS. But before we get started here, I'd first like to highlight a personnel change to our FSIS PHIS team. Many of you may know Carol Spencer, who has been an integral part for the development of our PHIS system for many years. Harold retired at the end of August, and Dr. Scott Seebohm has actually joined us in field operations to help guide the future enhancements for PHIS. Dr. Seebohm, would you like to share a few words?

Scott Seebaum: Thank you, Phil. Greetings, everybody. Appreciate the opportunity to take this new role to help bring PHIS to be the best tool that it can be for all of us. I've been with the agency for 20 years. I spent the first few years in the field as a implant veterinarian in the Dallas District, and then I since then have been in the Office of Policy and Program Development. I've been one of the people behind Ask FSIS since the beginning of it. I also worked on the initial implementation of PHIS, so I have some background in how PHIS works in the field and the potential that it has and some of the struggles that we've had with it over the years. And I hope to use that experience to, like I said, to make it the best tool that it can be for all of us. So I appreciate the opportunity, I'm excited about it, and I look forward to working with everyone involved to move it forward. Back to you, Phil. Thank you.

Phil Bronstein: All right, thanks, Dr. Seebohm. Over the years, FSIS has been working to give industry additional access to establishment data in PHIS. In February 2012, FSIS first opened PHIS to allow industry users to be able to view reports. And then in June 2018, PHIS was further enhanced to grant industry access to export applications directly into the system and also to allow corporate access. As many of you know, in the last release of PHIS, industry was given the ability to see key fields within their own PHIS establishment profile. And now FSIS will now expand data access to allow industry users to review and suggest modifications to FSIS establishment profile data associated with each establishment, such as product volumes and product groups.

And then after that, FSIS inspection personnel will then be able to verify and approve or deny any of the modifications within PHIS. Currently FSIS can see, as I mentioned before, can see the HACCP volumes and product groups, but all communication about this is done outside of PHIS. With this change, users will be able to communicate directly with the inspection personnel in FSIS within FSIS. With that being said, I will now turn the show over to Beth Bartel of Harmonia Holdings to demonstrate the current enhancements and address any questions that you may have. Beth.

Beth Bartel: Sure. Thanks Phil. I'm happy to be here. I have been working with PHIS since 2010, so I'm happy to go over these new enhancements and improvements to the application. Next slide, please. As you know, we're all here to learn about the updates to the establishment profile within PHIS, and this will be officially the 15.4 release of PHIS. Next slide. This release includes new workflows, and Phil kind of gave a brief peek into what those workflows are, and I'm going to go over them in more detail. But it's going to enable you to suggest changes to either product... Well, and product groups and HACCP volumes. And as Phil said, these suggestions are then reviewed and they're either applied or approved, if you want to call it approved, or denied by inspection program personnel, or IPP.

Let's get into what that looks like in PHIS. Next slide. Actually, I'm taking a step back. I want to go over the why. The goals for this release include increasing the visibility of establishment data for industry users. We did quite a bit of that in the 15.0 release, opening up more pages for industry. But now we want to also increase the accuracy of the data elements for product groups and HACCP volumes, because these are the elements that drive the assignment of inspection and sampling tasks. So we really want to have more eyes on this data and a way to alert IPP if there are issues with the data. And then there's more accountability of the data changes because we're going to be tracking what happens to your suggestion, was your suggestion implemented, was it approved, was it denied, why was it denied.

Next slide. Now getting into PHIS. We're going to start with the workflow for suggesting changes to product groups, and this page that's on here should look familiar to you. It's just a grid of product groups for a sample establishment. And in this workflow, you're going to start by just saying, "Okay, the second product group that's listed here, I actually think the weight is... That's way more than our average daily volume. I need to let the inspector know that." So in order to do that, you would select the Open icon for whichever product group you want to work with. Next slide. And once you select that Open, it's going to open the record. It's going to open the record in a read-only page. This is the read-only page. It's split into two parts. This is current functionality that you can see these two parts.

You cannot directly edit those fields, but you could request changes. So we put a new button on this page called Request Changes. Next slide. After you select that button, you're going to see new popup. It's called Product Group Change Request. And you're going to describe to the inspector what you need, what you think is a problem or what you think needs to be changed. So if I was doing this, I could write that the average daily volume is too large. I think it's actually in this range. And you could provide the range you think it's going to be in. And that's just a free text field so you can type, you can justify what you're saying, give an example, anything you think will be helpful for the IPP to see. Now, there is a Due Date field on here. It's an optional field, but if there's something pressing and you really want the inspector to look at this before a certain date, you can put that in there. It doesn't guarantee, it's more of a communication to the inspector that you would like to see this-

Beth Bartel: ... to the inspector that you would like to see this reviewed by a certain date. Again, it's not any guarantee, but it's just communicating to them the urgency. If it's not urgent or there's no specific date, you can just leave that blank. So once you type that up, again basically you're going to just select request changes. So that's submitting the change.

Next slide. So once you submit that change, PHIS does a number of things. It's going to close the pop-up. It's going to display a new tab. So you can see on this page, it's a change request tab with a grid. And the grid is going to list the pending changes for whichever establishment record we're on. It's going to include the change request that you just submitted. You can see that on the page. And it adds an exclamation point icon for the tab where the change is, and even on the menu for products. So right now, this sample that I have in front of us is showing us there's one change request for a product group, and there aren't any change requests for HACCP volumes for this establishment.

This change request tab is visible for industry users, and it is visible to IPP. So when IPP first select products from the menu, the first tab they're going to land on is this new change request tab. So this is an informational tab, but as a industry user, you could also go in there and open your request and delete it if it's no longer valid or if you accidentally made the request for the wrong product, you can delete it. Or if you want to add additional information and the request still is pending review, you can open it and modify it.

So for example, next slide. Next slide. Thank you. Perfect. So here we see in the top right, this is basically the same read only edit product group page that you see now. There's not a request changes button in the bottom because this product group already has a pending change. So it's not possible really to stack up pending changes. You can have one pending change at a time. So basically in that highlighted box on the right, there are those two icons. So you have a choice of whether you want to edit your request, or it could be a colleague of yours, you can edit a colleague's request. Anyone who has access as an industry user with either the corporate administrator role or the plant management role could edit the request. Or if you realize that the request isn't valid, you could delete it. So we'll go to the next slide.

So what I just walked you through was making changes for product groups and that involves that free text field. Now, making a change to the HACCP volume tab is actually, I think, a little more straightforward. You would select the HACCP volumes tab, and there's a new link next to each number. Those numbers are related back to the HACCP processing category. So in this example, raw non intact has the 250,000 to 600,000 range, and the raw intact has 600 to a million. So that submit change request only appears for industry users. So once you select that ... I'm sorry, you would want to select submit change requests if you think the volumes are off.

Next slide. So once you have selected that submit change request link, PHIS displays basically another pop-up. This one's called the average daily volume change request. And instead of typing in a free text box, you basically can select the range that you think it should be. Again, the due date there is optional. And then you select the request change in the bottom left. So once you've picked out your new volume, what you think it should be, you put the request change.

Next slide. So now similar to once we've made a change to the product groups, we see the exclamation point on the HACCP volumes tab. That's to indicate to both industry users and IPP, oh, there's a pending change request. You can also tell by, oh, the products menu has that icon. So instead of having to open the record to make a change, you can use those update and delete icons next to your change request to either update it or delete it. So as long as it hasn't been reviewed yet, you can make a change to it. Let's say you've made your request and it's been reviewed and you want to know what the outcome is. That's what that last tab is for. That's also a new tab. It is called the request history tab. The next slide will go over that.

Next slide. So here is a request history tab sample, and this tab is visible only to industry users because this is going to show you what happened with your change requests. So these change requests were reviewed individually by IPP, and you'll be able to see who submitted the change request. Was it a colleague, was it you? There are two grids here. So we tried to make it easy to find if you had a product group request, it's going to be in the top grid, a HACCP volume request is going to be in the bottom, and you'll see which inspector reviewed it and what their decision was.

So in the status column, you're going to have either denied or applied. If it's denied, the inspectors have a free text field that they need to complete, and they'll be putting the reasoning as they saw the data and why they thought they shouldn't change it. So they would type up some type of justification for the denied change request. Now, if it's an applied change request, it just automatically says the word completed. The inspectors don't put any justification because they agreed with you and they said, "Oh yeah, I should have updated that last week. Thanks for alerting me to it. I'm going to go ahead and make that change."

All right. Next slide. We're already ready for the questions. So I'll let the ...

Shayla Bailey: All right.

Beth Bartel: Yes, thank you.

Shayla Bailey: Yeah, thank you, Beth. So we do have a question that came into the chat, but I just want to remind the audience that you have three ways to ask questions. So you can raise your hand in the WebEx platform. So that looks like in your participant list, a little raise hand, or you may have an icon at the bottom of your screen that was for the little hand holding up stop. So that's the way you can raise your hand. You may also paste your question or type your question into the chat, and I'll be happy to read it for you. Or you can press #2 if you're joining us by phone today.

All right. So the question that did come in via chat, Scott asks, "Are these changes only allowed by establishment"-

Shayla Bailey: Plot asks, are these changes only allowed by establishment administrator level?

Beth Bartel: Yes, I can answer that. And I'm sorry. The two roles that can do it, there's a plant management role and a corporate administrator role. The establishment administrator actually is a role that's limited to just managing users at the establishments, user accounts. So, that particular role would not have access the export applicant. If some of you have that role, this isn't related to export at all. So, that particular role does not have access. So, the two roles that this applies to are corporate administrator and plant management. So, I hope that answers your question.

Shayla Bailey: All right. I am not seeing any other questions in the chat. Well, we did have one person who is experiencing some sound issues. So, I wanted to let everyone know that this event is being recorded and we do plan to share the recording on the event site or on the event page for this webinar. So, I am going to paste that into the chat for folks.

Phil Bronstein: And for folks to think of questions and put them into the chat. I just want to just kind of reiterate a couple of things that we mentioned here. Some of these things may seem like relatively minor changes, but they have potentially very large impacts for their industry. I do want to reiterate that both the passive volume and the passive categories are what drives inspection tasks. This data directly advises what inspection tasks are going to be required at your establishment. And also, if there is a verification sampling program associated with those products and volumes, then it's going to drive the sampling frequency and the eligibility for sampling at your establishments. So, these two fields, these fields within the establishment profile are very important to both FSIC and industry to make sure that we really understand what's happening at your establishment, how much product is being produced, and how often we need to do our sampling and our other verification activities.

So, while they might seem like relatively minor changes, they have a significant impact in the type of inspection that you are getting at your facility. So, I hope you will, as you think about it, think about how important it is to keep those accurate. And that's one of the reasons we wanted to give you access to it. We feel like if it is going to be driving inspection, and you think that the information is not as accurate as it could be, then you can suggest those changes to your inspection personnel and make it update appropriately.

Shayla Bailey: Thank you, Phil. So, we did have an additional question that came in via chat. John is asking if we can provide more information on how to add a corporate admin account and have all the facilities added.

Beth Bartel: Yeah. So, adding a corporate admin account, I won't probably be able to go over all the details, but there is an industry user guide that includes that information, but I'll give you a few pointers. The corporate administrator's name needs to be in the facility context for the establishment that you want to link to that person. So, that person needs to get an eAuth Level 2 account. And whatever name, so when you're signing up for that eAuth Level 2 Account, you have to give your first name, your last name, your email, some other information. It goes through a verification process. Once that's approved and you can log in with that name and password, that's the exact information that has to be on that facility contacts tab.

So, for example, if my name is Robert, but I go by Bob and I put Bob as my name in eAuth, but my colleague or the inspector puts my name in as Robert, it's not going to sync up. It has to be exact. If you change your name for whatever reason, you need to make sure the name, whatever name you have for your eAuth account has to match. Once that happens, it's gotten easier than it was when it was first implemented, because once you go to the enrollment URL or even just the PHIS URL, it finds your eAuth account and says, "Oh, someone with this eAuth account is trying to log in." And it goes and looks at all the facility contacts and it finds a matching eAuth account, and then it looks at the facility contact. Was this person given a responsibility of either establishment administrator or corporate administrator?

If it's one of those, PHIS will let you come in with that role and you'll be on your homepage. So, I know there used to be a process of plant management putting in, only an industry user could put in the contact for a corporate administrator, but now it's opened up a little bit more. You still need the plant management role to associate the establishment with the corporate headquarters, but the corporate admin should be able to get in when they're listed on the facility page with the exact matching information and the correct responsibility field.

So, if they put that you're the owner, which may be true, and they don't put either corporate admin or establishment admin, you're not going to get dropped in when you try to enroll and it will take you through the Enrollment Wizard. Which works too, but then someone at your establishment has to approve your enrollment. So, I hope that answers your question. And I did see another question pop up about when this will be released. It's being deployed on October 6th, so just a few days from now.

Shayla Bailey: All right. And we did have another question submitted via chat. So, Helena asked, this access will be only one for each establishment or can there be more than one?

Beth Bartel: There can be up to, I believe the number is 10 establishment administrators per establishment and up to 13 corporate administrators. And we actually really recommend that you have more than one establishment administrator for all of your establishments and more. And if you belong to a bigger corporate headquarters type of situation, you have more than one corporate headquarters. Because invariably, someone leaves and then we get establishments calling us saying, "Well, we don't have an establishment administrator anymore," and someone signed up for the plant management role and nobody's approving them. Nobody's approving their account request. And an industry is really responsible for managing their enrollment requests. So, you want to always make sure you want to kind of cover all your bases. You want to have at least two administrators.

And it can be establishment administrators or corporate administrators, but you need at least two of them in order to manage unforeseen circumstances. You should always have two active ones. And it's also important, even if you don't use PHIS daily, it's important to log in regularly, because if you don't use it for a long time, your eAuth account will become inactive, and then it's a huge amount of jumping through hoops to get that going again. So, just as a matter, of course, just have it as part of your routine. And you should really be looking, well, I shouldn't say what you should do, but it's a good idea to go into PHIS on a regular basis.

Beth Bartel: ... to go into PHIS on a regular basis. And if you haven't really explored PHIS, there's a lot more there for industry to see, since our May release. So it's really opened up a lot for industry. So we want to make sure everybody's taking full advantage of that.

Shayla Bailey: All right. Thank you for that, Beth. We do have another question that came in via chat. Jason asked, "I have a related question regarding corporate admin access. When a corporate admin contact is added to the facility contact tab and they establish a profile, how long does it take to have that establishment show up at the work area under the corporate admin role under the user's profile?"

"Just yesterday, my name was added to an establishment's contact page, but the access has not yet been granted. I have seen this happen before. Is there an approval taking place in the background or another reason for the delay?"

Beth Bartel: Okay, that's a great question. So without knowing the particulars, there is an existing issue that if they put you in the facility contacts, and they gave you the facility contacts page... And let's say they gave you corporate administrator and owner. We have a fix that's going out on the sixth that will allow there to be multiple responsibilities with either an establishment administrative role or corporate administrator role. But currently there's an issue that if you have more than one, the corporate admin is not going to get... You should be able to just go right into PHIS.

So since that didn't happen, I'm guessing they gave you more than one responsibility in the grid. If this would've happened after the sixth, you would be fine. You still would've gotten in. But in the short term what I recommend, is asking the person who added you to the facility contacts table to make sure that responsibility column has things like lab sample results, contact, owner, supervisor... It has like 20 different responsibilities, so make sure it only has corporate administrator. And then once they've saved that... And I would give it maybe a four hour timeframe to refresh the user management system. I would try going to the URL again, and logging in, and seeing if you get dropped in as corporate administrator.

So are you saying... I should back up for a second. Are you saying you already can get in, but you don't see that particular establishment in your list?

I mean, the answer is still basically the same, except... Now that I'm thinking about your question, it sounds like you're already in, you're just not seeing that new establishment in your work area. And I think it's caused by the same problem.

So if you could ask them to make sure you're only in there once... I mean, that you only have one responsibility. If you only have one responsibility, I'd have them check. You know, send you a screenshot of what they put as your name. Your first name, last name, and email, and look for a typo. It could be that. But there shouldn't be any lag time. And if you get listed in the contacts, you shouldn't... For corporate administrator or establishment administrator, there isn't necessarily an approval process for those account requests. If you're requesting export applicant or plant management, there is the approval process.

So, I hope that answers your question. My answer kind of went in two different directions. But yeah, we discovered that problem after the May release, and we prioritize getting that fixed. Because the field allows you to pick multiple responsibilities, so it needs to work with multiple responsibilities.

Speaker 1: All right. I do not see any questions on the phone or WebEx audience.

Shayla Bailey: Thank you. We did have a question asking for the link for PHIS, so I'm going to go ahead and put that into the chat. Just so folks can-

Beth Bartel: Yeah, thank you.

Shayla Bailey: ... have that, rather than reading it out.

And it looks like you've got a couple of thank yous in the chat, so I think you did address the question. I'm not seeing any others at this point. So if you do have a question, please feel free to enter in the chat or raise your hand.

Again, I'm putting the PHIS link into the chat, to answer that last question.

All right. I can turn it back over to you, Phil, if you have some closing [inaudible 00:36:18]-

Phil Bronstein: Yeah, sure. Once again, I wanted just thank everyone for calling in. We do have... I did put the link for the industry guide for PHIS on there. We also have a lot of great resources. Many of these trainings that we do for PHRS, we actually record and keep them online.

So if this is your first time thinking about PHIS or maybe thinking about expanding it, we have additional training that helps out. You can kind of... It walks you step by step by what you can do in PHIS, including if you're doing any exports or planning on doing any exports that are currently in PHIS exports going forward. And anything that's going forward that has the same sort of pathway.

So as we stated, these enhancements that we talked about today are going to be available on Friday, October the 6th. And the recording of this webinar and additional information will be posted to our website, I think either Friday or Monday. And you can find those using the link that was included in the constituent update and the email that you received. So if there are no other questions... I'll check one more time.

We do have one, how do you reactivate an inactive eAuth account? Beth, can you answer that one?

Speaker 1: Be sure to unmute yourself if you'd like to answer the question.

Beth Bartel: Oh, sorry. You would have to contact the eAuth help desk. That's handled really at the department level. It's not something that PHIS is involved with. Those accounts are required to get into our application, but the service desk is a department wide service desk. And it's not just the USDA service desk, it's a specific eAuth one, that you should be able to find just by googling USDA eAuthentication. And there should be a frequently asked question and a way to contact them.

Phil Bronstein: Right.

Shayla Bailey: Yes. I provided some links in the chat that might be helpful just to get-

Beth Bartel: Right.

Shayla Bailey: ... folks to eAuth information, and to start that registration process. On the PHIS page that I also provided a link to in the chat, there's some eAuth information there at the bottom.

Beth Bartel: Great. Thank you so much, Shayla.

Phil Bronstein: Yeah.

All right. If there are no other questions... First of all I'd like to thank our presenter, Beth Bartel, and then also our moderator, Shayla Mae Bailey. Who's also... If you guys don't know, she's also the leader of our FSIS webpage redesign, and responsible for the content on there. So thank you very much for all of the links.

Without further ado though, I'd like to thank everyone again, and I wish you have a great rest of the day. Thanks.

Speaker 1: That concludes our conference. Thank you for using event services. You may now disconnect.