PHIS Food Safety Assessment Reference Guide

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USDA Food Safety and Inspection Service

Contents

Introduction

PHIS provides an advanced and comprehensive tool for developing and conducting Food Safety Assessments (FSA), which are managed at the District Office.

The following table provides the list of roles for the FSA module.

Food Safety Assessment Roles
FSA Administrator
District Manager/Deputy District Manager
Case Specialist/S. EIAO
EIAO/S. EIAO

FSA Workflow

The workflow for FSAs in PHIS is as follows:

- A Case Specialist/S. EIAO or District Manager/Deputy District Manager creates an FSA and assigns the FSA to one or more EIAO/S. EIAOs.
- The EIAO/S. EIAO assigned to the FSA enters a start date, adds and completes the applicable FSA tools, and adds and completes lab sampling collection units when applicable.
- The EIAO/S. EIAO completes the FSA by entering an end date and recommendation, and indicating whether the FSA requires a review by a Case Specialist/S. EIAO or District Manager/Deputy District Manager. If the FSA requires a review, the EIAO/S. EIAO assigns the appropriate reviewers.
- The assigned reviewers review the FSA.
- If no edits are needed, the reviewer approves the FSA.
- If edits are needed, the reviewer rejects the FSA .The assigned EIAO/S. EIAO adds the reviewer's edits and feedback, and then either finalizes the FSA or submits it for review again.

FSA Statuses

The following table lists the FSA statuses and their definitions.

Status	Definition
Draft	The FSA was created but not assigned to anyone yet.
Assigned	The FSA was created and assigned to the appropriate personnel, but work has not yet begun on the FSA.
In-Progress	The FSA is In-Progress. Work has begun on the FSA but it is not yet complete.
Draft Final	The FSA is complete but requires a review by a Case Specialist, District Manager, or both.
Final	The FSA is complete and has been finalized. No edits are allowed, unless you unlock it and provide a justification.
Rejected	The completed FSA was reviewed by a Case Specialist, District Manager, or both but needs edits before it can be finalized.

Status	Definition
Unlock Final	A Final FSA was unlocked and is being edited.
Cancelled	The FSA was cancelled.

FSA Views

The main page where FSAs are displayed is the FSA Assignments page. The EIAO/S. EIAO, Case Specialist/S. EIAO, and District Manager/Deputy District Manager roles use this page to manage their FSAs.

There are three views available on this page:

FSA View	Description
My FSAs	Displays the FSAs that are assigned to you (as Assignee and Reviewer).
Active FSAs	Displays all FSAs that are assigned to other people, except for Cancelled and Final FSAs.
Archived FSAs	Displays Cancelled and Final FSAs.

FSA Administrator Tasks

The FSA Administrator role is responsible for creating the FSA tools in PHIS that are used by EIAO/S. EIAOs and Case Specialist/S. EIAOs. FSA Tools are created based on the statutes, rules, directives and other policies applicable to the targeted establishment.

FSA tools address the recordkeeping and approval processes for FSAs and help ensure consistency the way information is captured in the FSA process. Each FSA tool is composed of an FSA tool section and each section includes a series of questions

FSA Tools

An FSA tool is a grouping of one or more questionnaires. Each questionnaire is a section of an FSA tool.

The FSA Administrator role creates FSA tools by following these steps:

a. Create a new FSA tool
b. Create and publish the sections for the FSA tool, using the PHIS Questionnaire module.
c. Add each section to the FSA tool.
d. Publish the FSA tool.

After an FSA tool is published, EIAO/S. EIAOs can add the tool to their FSAs.

Create a New FSA Tool

1. Log in as a FSA Administrator.
2. Click **Manage FSA Tools**.
3. Click **Add New FSA Tool**.
4. Type a tool name and a description.
5. Click **Next**.
6. Click **Save**.

Create and Publish a Questionnaire for Each Section of the FSA Tool

After you create an FSA tool, the next step is to create and publish a questionnaire for each section of the tool.

For example, after you create the Demographics, Recommendation and Background FSA tool, you would create two questionnaires; one questionnaire for the Demographics and Recommendation section and a separate questionnaire for the Background and Inspection Information section.

For instructions on creating and publishing a questionnaire, please see the *PHIS Questionnaire Admin Reference Guide*.

Add Tool Sections to an FSA Tool

1. Log in as a FSA Administrator.
2. Click **Manage FSA Tools**.
3. Find the FSA Tool to add sections to, and then click **Open** (paper icon).

4. Click **Add Questionnaire**.
5. Select the section (questionnaire) that you want to add to the tool.
6. Click **Save**.
7. Repeat steps 5-7 for each section you need to add to the FSA tool.

Publish an FSA Tool

1. Log in as a FSA Administrator.
2. Click **Manage FSA Tools**.
3. Find the FSA Tool to publish, and then click **Open** (paper icon).
4. Click **Publish**.

Create and Assign an FSA (Case Specialist or District Manager)

1. Log in as a Case Specialist/S. EIAO or District Manager/Deputy District Manager.
2. From the left menu, click **Manage FSAs**.
3. Click **Create FSA Assignment**.
   The Create FSA page appears.
4. To the right of the Establishment field, click **Search**.
   The Establishment Search window appears.
5. Enter search criteria for the establishment.
6. Click **Search**
7. From the results, click **Select** next to the establishment.
   On the Create FSA page, the selected establishment appears in the Establishment field.
8. Select the appropriate check boxes.
9. If samples will be collected, select the Samples will be collected as part of FSA check box.
   If you select this check box, the assigned EIAO will be able to add sample collection records to this FSA. If you select No, the assigned EIAO will not be able to add sample collection records to this FSA.
10. If Other is selected in the list of checkboxes, type a justification in the Justification field; otherwise, go to the next step.
11. Click **Next.**
    The Assign FSA page appears.
12. Enter search criteria for the EIAO(s) or personnel to whom you are assigning this FSA.
    To search by OFO District, select OFO in the Business Unit field and then select the appropriate district.
    Note: If you assign the FSA to a person in a business unit other than OFO (for example, OPPD), please note that the person must have the appropriate FSA role assigned to their PHIS account.
13. Click **Search**.
14. From the results, select the check box for each person you want to assign.
    Each person you select appears as an Assignee under Selected Assignees and Reviewers.
15. Click **Save**.
16. Click **Close**.
    The FSA Assignments page appears. The FSA you created appears under Active FSAs with a status of Assigned. If you assigned the FSA to yourself, the FSA also appears under My FSAs.

Cancel an FSA

Case Specialists and District Managers can cancel FSAs in the following statuses:

- Draft
- Assigned
- In-Progress

1. Log in as a Case Specialist/S. EIAO or District Manager/Deputy District Manager.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Find the FSA that you want to cancel.

4. In the Cancel column, click the Trash Can icon.
   A confirmation message appears.
5. Click **OK**.
   The FSA status changes to Cancelled. The FSA is removed from the grid.

Cancelled FSAs are displayed in the Archived FSAs view.

Complete an FSA (EIAOs)

This section explains how an EIAO/S.EIAO begins and completes an FSA.

Open and Begin an FSA That was Assigned to You

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to begin.
4. In the Tools column, click the Wrench icon.
   The FSA Tools and Sample Collections page appears, on the Progress tab.
5. Enter the start date for the FSA.
6. Click **Save**.
   The status of the FSA changes to In-Progress.

Manage FSA Tools

After you open and begin an FSA that was assigned to you, add and complete the applicable FSA tools.

Formatting Options in Free-Text Fields

When completing free-text fields in FSA tools, if you click in a free-text field and a toolbar appears above the field, then spell check and formatting options (such as bold, italics, underlining, and bulleted and numbered lists) are available; and you can insert symbols by clicking the down arrow next to the Symbols button Ω.

If you click in a free-text field and no toolbar appears above the field, these options are not available in the field because the FSA Administrator did not configure the question to include these options.

Add FSA Tools

The order in which you add the FSA tools and tool sections is the order in which they appear in the printed FSA report.

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the Wrench icon.
5. Click the FSA Tools tab.

6. Click **Add Tool**.
   The Select Tool window opens.
7. From the drop-down list, select an FSA tool to add.
8. Click **Save**.
9. Repeat steps 2 – 4 until you have added the applicable tools.

Complete an FSA Tool

After you add tools to an FSA, follow these steps to complete the tools.

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the Wrench icon.
5. Click the FSA Tools tab.
6. For the tool or section you want to complete, click the icon in the Survey column.
   The Welcome to FSIS Questionnaire page appears.
7. Click **Start**.
   Page 1 appears.
8. Answer the questions on the page.
9. Click Next to continue.
10. Repeat steps 8 - 9 until you reach the Submit Questionnaire page.
    Note: If while completing the tool or section, you decide you want to save your answers so far and complete the tool or section later, click **Save and Close**. You are brought to the My Questionnaires page. Under Links, click FSA Tools and you are returned to the FSA Tools and Sample Collections page. The tool or section has a status of In Progress, until you reenter the tool or section, finish answering the questions, and submit it.
11. Click **Submit**.
    The My Questionnaires page appears.
12. Under Links, click FSA Tools.
    The FSA Tools and Sample Collections page appears. The status of the tool or tool section you just submitted is Completed. Note that you can edit your answers in a Completed tool or section up until you indicate the FSA is complete (and after you indicate it is complete, you can go back and edit answers if you unlock the FSA and provide a reason).

Remove FSA Tools

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the Wrench icon.
5. Click the FSA Tools tab.
6. Select the check box for the tool or tools you want to remove.

7. Click **Remove Selected Tools**.
   A confirmation message appears.
8. To continue, click **OK**.
   The selected tool or tools are removed from the grid.

Print FSA Tools

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the Wrench icon.
5. Click the FSA Tools tab.
6. Select the check box for the tool or tools you want to print.
7. Click Print Selected Tools.
   A confirmation message appears.
8. To open the selected tool or tools, click **Open**.
   The selected tool or tools opens in Acrobat Reader, from where you can print the document.

Manage Sample Collections

If you are collecting lab sample tasks for an FSA, follow the steps in this section to add and complete sample collections.

Copying Completed Sample Forms

When you add a lab sample collection that includes multiple sample forms, a Copy feature is available to help save time, for samples with the same project code that contain the same or similar information.

After you complete the first sample form for a specific project code, a Copy button becomes available. After you select a complete sample form to copy and click **Copy**, the following information is populated into the current sample form:

- Sample source
- Date collected and Parcel Pickup Dates
- Product Information
- Questionnaire answers

If necessary, you can edit any of the sampling fields and questionnaire answers.

Add a Sample Collection

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the wrench icon.
   The FSA Tools and Sample Collections page appears.

5. Click the Sample Collections tab.
   Note: This tab appears only when the Case Specialist who created the FSA indicated that samples would be collected for the FSA.
6. Click **Add Lab Sample Collection**.
   The Add FSA Sample Collection window appears.
7. In the Select Lab field, select the lab to send the samples to.
   The window refreshes. All sample forms for this FSA will be sent to the lab you have selected.
8. In the Select FSA Project field, select a lab sampling project.
   The options in this field are determined by the type of FSA you are performing (Routine or For Cause) and by the lab selected in the previous step.
9. Click **Submit**.
   A confirmation message appears.
10. Close the window (click **Cancel**).
    PHIS adds one or more units, depending on the project you selected.
    Note: PHIS determines how to add units based on the reasons for the FSA and the selected FSA project.
    - For a Routine FSA, PHIS adds one sampling unit for plants classified as Very Small, two sampling units for plants classified as Small, and three sampling units for plants classified as Large. For Lab Sampling projects designed for brine samples, PHIS will add only one unit at a time, regardless of plant size. If you want to add additional Brine sample units, click the Add Lab Sample Collection link again and select the same lab and select the same brine project.
    - For a For Cause FSA, PHIS adds one unit each time you click the Add Lab Sample Collection link. You can add up to a certain number of units. At the time of publication, the maximum number of units for a For Cause FSA is 5.
11. If necessary, repeat steps 6 – 10 to add additional lab sample collection units to the FSA.
12. Expand a lab sampling unit, by clicking the triangle to the left of the unit.
    The Lab Sample Collection form grid appears.
13. To open the first sampling task, click the **Edit** (pencil) icon in the far right column of the grid.
    The Sample Management – Sample Collection page appears.
14. On the Generate a Sample tab, complete the required fields.
15. Click **Save**.
    The Sample Collection Data tab appears.
16. On the Sample Collection Data tab, click the **Schedule Sample** link.
    The Lab Sample Collection window appears.
17. In the Collection Date field, accept the default or select a new date.
18. In the Parcel Pickup field, accept the default or select a new date.
19. Click **Save**.
    The Sample Collection Data tab appears with the dates completed.
20. Complete the remaining required fields.
21. Note the Lab Sample Collection Form number in the Sample Form field.
22. Click **Save & Continue**.
    The Additional Info tab appears.

23. If a questionnaire is associated with this lab sampling project, click Take Questionnaire. Otherwise, go to step 26.
24. Answer the questions. When you reach the Submit Questionnaire page, click **Submit**.
    The My Questionnaire page appears.
25. Under Links, click Lab Sampling.
    The Sample Management – Sample Collection page appears.
26. Click **Submit to Lab**.
    The page refreshes and the data is now read-only.
27. Click **Close**.
    The FSA Tools and Sample Collections page appears.
28. Expand the lab sampling unit again.
    Notice that the sampling task you completed has additional information in the grid and a status in the Status column of Sent to Lab.
29. To open the next sampling task, click the **Edit** (pencil) icon in the far right column of the grid.
    The Sample Management – Sample Collection page appears.
30. Do one of the following:
    - If the information for this sampling form is the same or almost the same as a previously entered sampling form, and the project codes are the same, copy that sampling task. Click the Sample Collection Data tab. In the Copy sample collection data from field, select the form ID you want to copy. Then click **Copy** and click **OK** in the confirmation message. The information from the selected sample form is copied to the current sample form. If necessary, you can edit any of the sampling fields and questionnaire answers.
    - Complete the required fields and the questionnaire.
31. Click **Save**.
32. Click **Submit to Lab**.
    The page refreshes and the data is now read-only.
33. Click **Close**.
    The FSA Tools and Sample Collections page appears.
34. Continue to work with the lab samples, until all of the samples in all the units have a status of Sent to Lab.

Remove a Sample Collection

If you find you have accidentally added a sampling unit and want to remove it, and you have not completed any lab sampling forms for the unit, click the **Delete** (trash can) icon to the right of the unit. Select a Justification from the drop-down list and click **Save**.

Edit the FSA Details

You can edit the reasons and the assignees for an FSA, while the FSA is in Assigned or In-Progress status.

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.

3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the **Edit** (pencil) icon.
   The Edit FSA page appears.
5. Edit the reason or reasons as necessary. Select the appropriate check boxes for additional. Clear the check boxes for reasons that no longer apply or were selected in error.
6. Click **Next**.
   The Assign FSA page appears.
7. Enter search criteria for the EIAO(s) or personnel to whom you are assigning this FSA.
   To search by OFO District, select OFO in the Business Unit field and then select the appropriate district.
8. Click **Search**.
9. From the results, select the check box for each person you want to assign.
   Each person you select appears as an Assignee under Selected Assignees and Reviewers.
10. Click **Save**.
11. Click **Close**.
    The FSA Assignments page appears.

Manage Attachments

Add Attachments to an FSA

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the Wrench icon.
   The FSA Tools and Sample Collections page appears.
5. Click the Progress tab.
6. Click Add Attachment.
   The Upload Documents box appears.
7. Click **Browse**.
8. Navigate to the file on your computer, select it, and then click **Open**.
9. In the Document Title field, type a title for the attached document.
10. Click **Upload**.
    The file you attached appears in the grid.

Delete an Attachment from an FSA

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the Wrench icon.
   The FSA Tools and Sample Collections page appears.
5. Click the Progress tab.
6. In the Attachments grid, click the Trash Can icon for the attachment you want to delete.

A confirmation message appears.

7. Click OK.

   The attachment is removed from the grid.

Manage MOIs

Add MOIs

1. Log in as an EIAO/S. EIAO.
2. From the left navigation menu, click **Inspection Verification > Select Establishment**.

   The Domestic Inspection page appears.
3. Select the radio button for the establishment you want to work with, or use the Search tab to search for and select an establishment.

   The Domestic Inspection page refreshes and the selected row turns orange.
4. From the left navigation menu, click **Memorandum of Interview**.

   The MOI List page appears.
5. Click **Add MOI**.

   The Memorandum of Interview (MOI) page appears.
6. On the Status tab, review the default information and make changes as necessary.
7. Select a meeting time.
8. Type the subject of the meeting.
9. Click the Issues tab.
10. Complete the fields as appropriate.
11. If you have a response from plant management, click the Response tab and insert it in the response; otherwise, go to the next step.
12. Click **Save**.

Finalize a MOI

1. Log in as an EIAO/S. EIAO.
2. From the left navigation menu, click **Inspection Verification > Select Establishment**.

   The Domestic Inspection page appears.
3. Select the radio button for the establishment you want to work with, or use the Search tab to search for and select an establishment.

   The Domestic Inspection page refreshes and the selected row turns orange.
4. From the left navigation menu, click **Memorandum of Interview**.

   The MOI List page appears.
5. Click the Edit (pencil) icon for the MOI you want to finalize.
6. Complete any remaining fields.
7. Click **Finalize**.
8. Click **Save**.

Complete an FSA and Indicate Whether a Review is Required

After you complete the applicable FSA tools and lab sampling collections (if applicable), enter an end date for the FSA and indicate whether the FSA requires a review by a Case Specialist, District Manager, or both before the FSA is final.

When an FSA requires a review, you must also assign the appropriate reviewers to the FSA.

Before you can complete an FSA that includes lab sampling:

- All the lab sampling forms must be submitted to the lab.
- All the questionnaires associated with the lab samples must be completed and submitted.

Complete an FSA When a Review is Required

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the Wrench icon.
   The FSA Tools and Sample Collections page appears.
5. Click the Progress tab.
6. In the End Date field, type the end date for the FSA or click the calendar icon to select a date.
7. Click the Complete radio button.
   The check boxes under Recommendations become available.
8. Under Recommendations, select all the recommendations that apply to this FSA.
9. Under Does this FSA Require a Review?, click the Yes radio button.
10. Click **Next**.
    The Assign FSA page appears.
11. Enter search criteria for a Case Specialist or District Manager to whom you are adding to this FSA as a reviewer. To search by OFO District, select OFO in the Business Unit field and then select the appropriate district.
12. Click **Search**.
13. From the results, select the check box for each person you want to assign.
    Each person you select appears as a Reviewer under Selected Assignees and Reviewers.
14. If necessary, repeat steps 13-15 until you have added all the reviewers.
15. Click **Save**.
16. Click **Close**.
    The FSA Assignments page appears.

The status of the FSA becomes Draft Final.

Complete an FSA When a Review is Not Required

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.

3. Under My FSAs, find the FSA that you want to work on.
4. In the Tools column, click the wrench icon.
   The FSA Tools and Sample Collections page appears.
5. Click the Progress tab.
6. In the End Date field, type the end date for the FSA or click the calendar icon to select a date.
7. Click the Complete radio button.
   The check boxes under Recommendations become available.
8. Under Recommendations, select all the recommendations that apply to this FSA.
9. Under Does this FSA Require a Review?, click the No radio button (to indicate that this FSA does not require a review by a Case Specialist or District Manager).
10. Click **Save**.
11. Click **Close**.
    The FSA Assignments page appears

The status of the FSA status becomes Final, and the FSA is locked (meaning you cannot edit it). However, you can add changes if you unlock the FSA and provide a reason.

If you need to review an FSA in Final status, use the Archived FSAs view on the moves to Final status, you can view it on the Archived FSAs view on the FSA Assignments page.

FSA Review Process

After an EIAO completes an FSA that requires a review and assigns a Case Specialist, District Manager, or both as reviewers, a reviewer views the FSA, provides edits and feedback to the EIAO when necessary, and indicates whether the FSA is approved or rejected.

For Rejected FSAs, the assigned EIAO adds the reviewer's edits and feedback, and then can submit the FSA for review again if necessary.

Review a Draft Final FSA (Case Specialist or District Manager)

1. Log in as Case Specialist/S.EIAO or District Manager/Deputy District Manager.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Find the FSA that you want to review. FSAs to which you were added as a Reviewer appear in your My FSAs view.
4. In the Tools column, click the Wrench icon.
   The FSA Tools and Sample Collections page appears.
5. Click the FSA Tools tab.
6. Review the completed FSA tools as necessary. To view any FSA tool or tool section:
   a. Click the icon in the Survey column.
      The Welcome to the FSIS Questionnaire page appears.
   b. Click **Resume**.
   c. Review the responses to the questions.
   d. Click **Next** to move to the next page.
   e. When you are finished reviewing the responses, click **Cancel**.
      The My Questionnaires page appears.
   f. Under Links, click FSA Tools.
      The FSA Tools and Sample Collections page appears.
7. To view the FSA report, do the following:
   a. Select all FSA tools by clicking the check box in the column heading to the left of the FSA Tool column.
      All FSA Tools are selected.
   b. Click **Print Selected Tools**.
   c. If you receive a message asking if you want to open or save the FSA_Report.pdf file, click **Open**.
      The FSA report opens in Adobe Acrobat Reader.
   d. Close the report when you are done.
8. If the FSA includes lab sampling, and you want to review the sampling information, click the Sample Collections tab.
9. Review the sampling information as necessary.
10. If applicable, provide your edits and feedback to the assigned EIAO or EIAOs.

Approve a Draft Final FSA (Case Specialist or District Manager)

After you review a Draft Final FSA as a Case Specialist/S.EIAO or District Manager/Deputy District Manager, follow these steps to approve the FSA.

1. Log in as Case Specialist/S.EIAO or District Manager/Deputy District Manager.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Find the FSA that you want to review. FSAs to which you were added as a Reviewer appear in your My FSAs view.
4. In the Tools column, click the Wrench icon.
   The FSA Tools and Sample Collections page appears.
5. Click Progress tab.
   Under the Review radio button, click **Approve**.
6. (Optional) In the Comments field, type any comments you want to record.
7. Click **Save**.
   A confirmation message appears at the top of the page. The FSA Assignment Event Log includes a new row, with the DM/DDM's name and comments.

The FSA's status becomes Final. and the FSA is locked (meaning you cannot edit it). However, you can add changes if you unlock the FSA and provide a reason.

Reject a Draft Final FSA (Case Specialist or District Manager)

After you review a Draft Final FSA as a Case Specialist/S.EIAO or District Manager/Deputy District Manager, follow these steps to reject the FSA.

1. Log in as Case Specialist/S.EIAO or District Manager/Deputy District Manager.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Find the FSA that you want to review. FSAs to which you were added as a Reviewer appear in your My FSAs view.
4. In the Tools column, click the Wrench icon.
   The FSA Tools and Sample Collections page appears.
5. Click Progress tab.
   Under the Review radio button, click **Reject**.
6. (Required) In the Comments field, type your comments.
7. Click **Save**.
   A confirmation message appears at the top of the page.

The FSA's status becomes Rejected. Next the EIAO needs to add the reviewer's edits and feedback, and complete the FSA again.

Edit a Rejected FSA and Add Feedback (EIAO)

After a Case Specialist or District Manager rejects an FSA, the EIAO to EIAOs who were assigned the FSA can edit the FSA and add reviewer feedback.

The EIAO changes the FSA status to In-Progress, makes the necessary edits, and then completes the FSA again.

1. Log in as an EIAO/S. EIAO.
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. Under My FSAs, find the Rejected FSA that you want to work on.
4. In the Tools column, click the Wrench icon.
   The FSA Tools and Sample Collections page appears.
5. On the Progress tab, click In-Progress.
6. Click **Save**.
   A confirmation message appears at the top of the page. The FSA status becomes In-Progress.
7. Edit the FSA as necessary.
8. Click the Progress tab.
9. Click the Complete radio button.
10. Complete the FSA and indicate whether another review is required. Follow the steps in one of the following topics (whichever is appropriate for the situation):
    - *Complete an FSA When a Review is Required*
    - *Complete an FSA When a Review is Not Required*

Unlock an FSA

1. Log in as an EIAO/S. EIAO, Case Specialist/S.EIAO, or District Manager/Deputy District Manager
2. From the left menu, click **Manage FSAs**.
   The FSA Assignments page appears.
3. In the My FSAs drop-down field, select Archived FSAs.
4. Search for the Final FSA that you want to unlock.
5. In the Tools column for the Final FSA, click the Wrench icon.
   The FSA Tools and Sample Collections page appears.
6. Click the Progress tab.
7. At the bottom of the page, click **Unlock**.
   The Unlock Justification window appears.
8. Type reason you are unlocking the FSA.
9. Click **Save**.
   The FSA Assignments page appears. The FSA is available again on the My FSAs view, and the status changed to Unlock Final.

After you unlock a Final FSA and make the necessary changes, you'll need to complete the FSA again and indicate whether a review is required. For more information, see the following topics:

- *Complete an FSA When a Review is Required*
- *Complete an FSA When a Review is Not Required*