

PHIS LOG-IN, INSPECTOR'S HOMEPAGE, AND ALERTS

Objectives

After completing this section of the training, participants will be able to:

1. Identify the steps for logging into PHIS.
2. Identify the information provided in the 3 tabs on the inspector's homepage.
3. Navigate the inspector's homepage.
4. Use several PHIS controls.
5. State the purpose of alerts.
6. Access detailed information for the assigned establishments from the inspector's homepage.

Logging into PHIS

When IPP are in their assignment, PHIS access is controlled by the USDA's eAuthentication (eAuth). To access PHIS, IPP direct their browser to <https://phis.FSIS.usda.gov/>. When the eAuthentication login screen appears, IPP may enter their user ID and password and then click the login button, or click the Lincpass button, select a certificate, and enter their PIN. The PHIS homepage is presented once the IPP has successfully logged-in.

Note: In this training, you will access PHIS through the FSIS Application Portal (FSIS Intranet). Several example IPP names have been assigned in the PHIS training database. The FSIS instructor will assign you a specific number between 1 and 50. You will use that number plus an example inspector name depending on the assignment to access the PHIS training database, e.g., **Robert Barclay 01** or **Robert Allen 01**, if you were assigned the number 1.

PHIS Homepage/Inspector's Homepage

The PHIS Homepage provides a point of entry to PHIS. PHIS homepages are role-based and configured by an administrator. The functionality and information that appears on the homepage is relevant to the user's role, responsibilities, and work assignment. There are several user roles in PHIS, e.g., CSI, PHV, FLS, and EIAO. Some users may be assigned multiple roles. For instance, the FLS and

PHV roles are also assigned the CSI role. When a CSI logs into PHIS, the first page that appears in PHIS is the ***Inspector's Homepage***.

Hands-on Activity

The following hands-on section is intended to provide familiarity and experience with the Inspector's Homepage. You will learn to navigate the features of the Inspector's Homepage using Holland Point Foods and Groveton Meats, a large deli meat establishment and a small grinding establishment respectively, as the example establishments.

Follow these steps along with the instructor.

- ▶ Open the laptop
- ▶ Log-onto laptop:
 - User Name: ***FSIS_user***
 - Password: ***FSIS***
- ▶ Double click the Start Internet Explorer icon
- ▶ PHIS training database Log-in
 - Select User: **Robert Barclay (your #)** from the drop down list

Inspector's Homepage

At the top of the inspector's homepage is a "welcome statement". It indicates the user's name and the user's current role, i.e., Consumer Safety Inspector. The USDA banner appears on all USDA web pages. Public Health Information System appears on all pages within PHIS. The role is identified underneath the banner. Users assigned multiple roles (e.g., PHV or FLS), can use the drop down list (down arrow) to change roles. There is a PHIS menu that has a home link for the inspector to navigate home. It also has links that allow the inspector to access an overview of PHIS and to log out of PHIS. Many PHIS pages have navigation menus. The menu options depend on the user's role. Every PHIS page has a header. The header indicates the functionality being displayed in the context of area or page, e.g., Home, Noncompliance Record, or Agenda List page. The header includes "breadcrumbs" that show the page navigation that was followed to reach the current page and enables the inspector to navigate back to previous pages. A "content area" appears on all PHIS pages. This area of the page provides the functionality needed to enable the inspector to perform a task within PHIS. Links to additional resources or "Smart Links" appear at the bottom of inspector's homepage.

The inspector's homepage provides several data summaries under various tabs. The data is presented in small tables or grids called widgets. Some widgets provide short-cuts (links) to access additional data or sort data. The inspector can get additional information or can initiate an action by clicking on the ***action icon*** or the ***underlined*** word.

The Inspector's homepage in PHIS has three tabs: My Dashboard, My Establishments, and My Inspections and Samples. The My Dashboard tab is the default view for the Inspector Homepage. Each of the tabs has widgets. The My Dashboard tab has three widgets: Alerts, My Tasks, and Smart Links.

Navigating the Inspector's Homepage/PHIS Controls

Alerts are generated automatically in PHIS based on entered data, inspection results and other events, and are coordinated with e-mail distributions. Alerts are an important way that IPP receive notification of certain events or new requirements, and are reminded of tasks that need to be performed because they are approaching their due date. **Alerts are only available through the inspector's homepage.**

Look at the alerts widget. There are 5 alerts in the grid sorted in date order with the newest alert on top.

1. Click on the **Unassigned lab sampling task approaching due date**
 - The alert message window is displayed
 - The messages are created by PHIS based on instructions or criteria set up by a system administrator. Typically a message will have a description, some detail regarding the establishment, and some instructions regarding what IPP are to do in response to the alert.
2. Click **Mark as Read** button in the message detail window
3. Click the **"X"** in the upper right corner to close alert window
 - The alert disappears from the list of alerts
4. Click the **Show All Alerts** link
 - The alert appears in the grid but it is no longer in bold type and it is designated as "read" (changed from "NO" to "Yes")

Alerts provide critical information and they remain in alerts grid even after they have been read and after they have been addressed.

The My Tasks widget provides a list of the inspector's scheduled tasks. Let's use this widget to get familiar with some PHIS grids and their controls, and the **red action arrow**.

5. Click the **Date** link
 - Sorts the tasks by date
 - Task with the oldest date is now listed first
6. Click the **Date** link again
 - Sorts the tasks by date
 - Task with the most current date is now listed first (this the default)

7. Click the **Right Arrow** at the bottom of the grid
 - Advances the grid to the next page
8. Click the **Left Arrow** at the bottom of the grid
 - Advances the grid to the previous page
9. Type a **2** in the page size box
10. Click the **Go** button
 - Advances the grid to page 2
11. Type a **8** in the page size box
12. Click the **Change** button
 - Changes the number of records displayed from 2 to 3

Note: The page controls are the same for all data grids

13. Click the **Date** link
14. Click the **Date link** again
15. Click the **Red Arrow** button in front of the **General Labeling** task dated **1/7/2016** for Holland Point Foods
 - The Inspection Results page is displayed
 - This is not the primary way we access the Inspection Results page but it is an example of how to use some PHIS controls.

Some tabs and buttons are disabled (grayed out), e.g., HATS (Humane Activity Tracking System), Create/Edit MOI, and Create/Edit NR.

16. Click the **Activity tab**
17. Click the **Recordkeeping** radio button for the Verification Activity
 - A **red asterisk** means that the data entry is mandatory
18. Click on the **Findings** tab.
19. Click the **Non-Regulatory Concern** checkbox.
20. Click the **Save** button
 - The Create/Edit MOI button is now enabled

Note: Clicking the save button, saves data from **ALL** the tabs on the Inspection Results page.

Note: Using the Non-Regulatory Concern box is the method of creating an MOI that is linked to a specific task, e.g., mistreatment of live poultry when found during the performance of the Good Commercial Practices (GCP) task.

21. Click the **Cancel** button
22. Scroll down to the bottom of the My Dashboard tab to see the **Smart Links** Widget.

The smart links widget at the bottom of the inspector's homepage provides easy access to information pertaining to inspections. The text is underlined indicating

that this is a link to other pages or databases. They are called “smart” because they are customized to the inspector role. The links do not work on the training laptop computers because there is no internet connectivity.

23. Click on the **My Establishments** tab on the homepage

The My Establishment tab has four widgets: My Establishments, Non-compliance Record, FSA, and Appeals. Let's use the My Establishments widget to get familiar with some PHIS grids and their controls.

24. Click on the **Red Arrow** button for **Holland Point Foods** in the My Establishments widget
25. **Scroll Down** and browse the establishment homepage information that is displayed.

Note: The Establishment homepage can also be accessed using the left navigation menu on the inspector's homepage.

26. Click the **Home link** bread crumb to return to the homepage
 - You are here: > **Home** > Domestic Profile > Establishment Homepage
27. Click the **My Inspections and Samples** tab

The My Inspections and Samples tab has three widgets: Inspection Agenda, Inspection Note, and Lab Sample Collection. Let's use the Lab Sample Collection widget to get familiar with some PHIS grids and their controls. This widget identifies the sampling projects and provides a sampling history.

28. Click the **All Lab Submissions** drop down list arrow to select the lab sample status
29. Highlight and click **Sent to Lab**
 - Only the samples sent to the lab appear in the grid
30. Click the **Red Arrow** in the left column next to the to review the details of the lab sample collection data
31. Click the **Go Back** button

The left navigation menu appears on **ALL** on PHIS pages for the CSI role. Menu items that have a down arrow will have sub menu links that access additional data.

32. Click on the **Down Arrow** next to Establishment Profile in the left Navigation Menu
 - Sub-menu links are displayed
33. Click on the **Up Arrow** next to Establishment Profile in the left Navigation Menu
 - The sub-menu collapses

34. Click **Inspection Verification** in the left navigation menu
35. Click **Select Establishment**
36. Click the **Radio Button** in front of Groveton Meats.

Note: Anytime "Select Establishment" is a sub menu item, IPP must select an establishment before clicking on any other sub menu item! IPP must click the radio button in front of the establishment they intend to select even if the radio is already selected. If not, an error message will appear at the top of the page. Only the Establishment Profile and Inspection Verification on the left navigation menu have "Select Establishment" as a sub menu item.

37. Click the **Memorandum of Interview** sub-menu
38. Click the **Edit** icon (pencil) for the **finalized** MOI.
 - The "Save" button is disabled (grayed) and a blue "Finalized" message is on the top of the page. If the MOI was not finalized, then the "Save" would be enabled.
39. Click the **Red X** in the top right corner to sign out