ESTABLISHMENT TASK LIST AND THE TASK CALENDAR

Objectives

After completion of this module, the participant will be able to:

1. Identify the FSIS Directive that provides instructions to IPP for scheduling inspection tasks in PHIS.

2. Define the following terms:

   a) Task Library,
   b) Establishment Task list,
   c) Task calendar,
   d) Routine Task, and
   e) Directed task.

3. Describe how the task list is created for an establishment.

4. Identify situations that require IPP to schedule and perform directed tasks.

5. Identify the two sections of the PHIS task calendar page.

6. Describe the principles that IPP follow when scheduling and performing inspection tasks.

7. Describe the steps that IPP need to perform the first time they log in to PHIS each day.

8. Identify the features of the establishment task list.

9. Navigate the features of the task calendar page.

10. Filter an establishment's task list and IPP's task calendar.

11. Designate an approved operating day on the task calendar as "inactive" when the establishment is not operating.

12. Schedule, remove, reschedule, and reassign routine tasks considering the task priority, the IPP's workload, and the number tasks completed to date.

13. Designate a scheduled task as "not performed" when it was not completed during the month.

14. Schedule a directed task for a specific date using the task calendar.

References

1. FSIS Directive 13000.1 Scheduling In-Plant Inspection Tasks in the Public Health Information System (PHIS),
2. PHIS Users Guide on the insideFSIS Intranet PHIS page, and
3. PHIS Quick Reference Guide

Background

FSIS recognizes that IPP have a variety of time constraints when they perform their inspection duties including the production schedule of their assigned establishments, staffing, travel for patrol assignments, emergencies that arise, and other factors. Hence, the task calendar function of PHIS was purposely designed to provide IPP with the flexibility in determining when to perform their inspection tasks. A "task" is a verification activity or data recording activity that IPP perform. The establishment task list displays the inspection tasks to be performed in the establishment each month. It also gives important information about each task, such the as expected number to be performed and the priority level. IPP use this information to assist them in deciding when to schedule the inspection tasks on their task calendar. If all the inspection tasks cannot be completed in the assignment by the end of the month, IPP must ensure that they **complete the tasks with the highest priority level** in PHIS because these tasks have the greatest impact on public health.

PHIS Task Library

The PHIS task library is a component of PHIS that lists all the different kinds of routine inspection tasks that may be performed by IPP. It also provides a description of each task (See Table 1). The Office of Policy and Program Development staff members maintain the tasks in the task library. The task library provides the following information for each inspection task:

1. Name, task code, and description: In PHIS, the task name is the common way to distinguish one task from another. In certain components of PHIS IPP may see a code for a task. The code is maintained internally for analytical purposes;

2. Priority: Task priorities are expressed on a scale from 1 to 6 with 1 being reserved for emergency tasks, 2 being the highest routine task priority, and 6 being the lowest routine task priority. The task priorities are determined by the Data Analysis and Integration Group (DAIG) based on the analysis of the relative public health importance of the task (See Attachment 1).

3. Expected frequency: The frequency is expressed in terms of establishment operating days for most routine tasks. Other tasks may be per month, per quarter, or per year. Some directed tasks may be listed by the number of instances to be performed by a specific due date rather than an ongoing frequency;

4. Inspector guidance: Brief guidance on how to perform the task, including links to applicable FSIS Directives or Notices;

5. Mandatory regulatory citations: These are the regulatory requirements that must be verified each time IPP perform the task;

6. Other regulatory citations: These are additional regulatory requirements that might be verified during the performance of the task;

7. Specific data to be recorded each time IPP perform the task; and

8. The type establishment the inspection task applies to based on establishment profile data, such as the HACCP process category and product types.

PHIS Establishment Task List

PHIS will compare the task definitions in the task library to information captured in the establishment's profile. Based on this comparison, PHIS will generate a list of the appropriate routine tasks to be performed in each establishment. In other words, the establishment task list is the source of routine inspection tasks added on task calendar and performed by IPP assigned to that particular establishment. Recall from the establishment profile presentation that IPP are responsible for keeping the establishment task list up-to-date and accurate. When IPP review the profile, they determine if any tasks are missing from the list and add them to the list. IPP also determine if any tasks on the list are not applicable to the establishment operations and remove them from the list.

PHIS Task Calendar

The task calendar is an electronic tool in PHIS that IPP use to plan or schedule the tasks they will perform each month. It provides IPP with the flexibility to schedule tasks on days that work best for their assignments. For instance, the task calendar allows IPP to schedule tasks on the day a particular product is produced. It also allows IPP to re-schedule a task to different day if the establishment changes its operating schedule or if an unforeseen issue arises. Lastly, IPP initiate the documentation of the task results or findings and provide reasons why tasks were not performed from the task calendar.

Routine Inspection Tasks

Routine tasks are inspection verification activities conducted on a routine, on-going or planned basis under normal conditions. Routine tasks are allocated based on the information in the establishment's profile, e.g., HACCP processing category and products. The frequencies for most routine inspection tasks are pro-rated based on the number of days each establishment operates during a given month. PHIS calculates the expected number of tasks based on each establishment's approved operating hours recorded in the profile.

Directed Inspection Tasks

Directed inspection tasks are those that do not occur on a routine basis under normal circumstances. These tasks are performed on an as needed basis. Sampling tasks and export certification tasks are considered to be directed tasks because they do not occur on a routine basis. The scheduling and performing of sampling tasks will be discussed and demonstrated later in this training session.

There are a number of ways a directed task may be initiated.

- **Positive Pathogen Sample Result**

    PHIS will automatically add follow-up sampling tasks and other directed inspection tasks such as the HAV task to the establishment task list when a raw beef product sample is positive *E. coli* O157:H7 or non-O157 STEC. For other types of pathogen positive sample results recorded in PHIS, a directed HAV task is added to the establishment task list.

- **FSIS Headquarters Personnel**

  FSIS headquarters personnel may add directed tasks to one or more establishments' task list based on identified needs. For instance, if a particular food safety concern is identified for particular product or process, e.g. fermented dry sausage, headquarters personnel may add a directed task to the task list of all establishments that produce fermented dry sausage.

- **Supervision**

  District Office personnel or the IPP's supervisor may request that the IPP perform directed tasks, e.g., due to a food borne illness outbreak investigation, or product recall, FSA findings, food defense alert, or according to the verification plan developed after an enforcement action is deferred or held in abeyance.

- **FSIS Policy**

  In poultry slaughter establishments, Directive 6420.5 instructs IPP to perform a zero tolerance verification task twice per shift for each slaughter line. PHIS currently adds 44 routine poultry zero tolerance tasks to the establishment's task list each month. Therefore, in establishments with multiple slaughter lines, IPP are to schedule additional instances of the routine task as directed tasks to accomplish the two fecal zero tolerance tasks for each evisceration line per shift requirement.

  When the establishment is required to implement the corrective actions in 9 CFR 416.15 or 417.3, IPP are to verify that the establishment meets those corrective actions. IPP may need to perform a directed instance of the routine SSOP verification task or HACCP verification task to verify these corrective actions unless a SSOP verification task or HACCP verification task is already scheduled for that day and it has not been completed.

- **Conditions Observed in the Establishment**

  IPP are to initiate a directed task based on conditions observed in the establishment. These conditions are often referred to as unplanned, "stumble-on" situations. For example, an IPP is walking through the establishment performing other duties when she observes a sanitary performance standard (SPS) noncompliance. The IPP is to initiate a directed instance of the SPS verification task to record her findings and document this noncompliance.

  Note: Whenever IPP initiate a directed task, it is always added to the task calendar as an additional instance of the routine task.

PHIS Task Calendar Page

IPP use the PHIS task calendar page to:

- schedule the tasks they perform each month,
- access guidance for the task,
- remove scheduled tasks,
- re-schedule a task on a different day,
- reassign scheduled tasks,
- document task results, and
- designate tasks that could not be performed by the end of the month as "not performed."

The **Task Calendar page** has two sections: an establishment task list and calendar. At the top of the Establishment Task List is the **"Assignments" filter**. When IPP have multiple assignments, they use the "Assignments" filter to select a specific assignment. When an assignment is selected, the establishment task list and task calendar will then display the information for that assignment and allow the inspector to schedule tasks and enter inspection results for that assignment. The tasks IPP are expected to perform in each establishment within the inspection assignment are displayed on the **Establishment Task List.**

A task can be added from the Establishment Task List to the IPP's Task Calendar by scheduling the task for a specific date. As IPP schedule tasks on the calendar and perform them, the establishment task list provides information about each inspection task, e.g., the number scheduled and the number done.

The purpose of the "**Task Calendar"** is to display all of the specific tasks scheduled for *all* IPP and *all* establishments in the assignment.

Scheduling Inspection Tasks

IPP use the **frequency and priority level of each task** on the Establishment Task List and their knowledge of specific establishment operations, time constraints, staffing, and other factors to schedule their inspection tasks each month. At the end of the month, the number of tasks that are scheduled should be equal to the expected number of instances of the routine tasks that are on the establishment's task list. IPP should develop a method for preparing the task calendar that will help them to complete as many routine tasks that are on the establishment's task list as possible. In other words, develop a scheduling method that works best (most efficient and effective manner) for their specific inspection assignment. For example, IPP may prepare a monthly calendar of inspection tasks for each establishment. On the first day of each month, IPP add *all* of the expected number of instances of the routine tasks to the calendar.

Another IPP may decide to add instances of the routine tasks at the beginning of each work week for the entire week. In either case, IPP are to use the following principles when scheduling tasks.

1. IPP are to use their knowledge of establishment operations to schedule tasks when the applicable establishments will be operating and, if appropriate, will be producing the applicable product type. The operations conducted and the products produced by establishments are subject to change. If IPP have prepared the task calendar at the beginning of the month or the beginning of the week, changes in production may impact the actual tasks that can be completed. Based on information that IPP gather, they may need to reschedule, remove, or move inspection tasks as appropriate.

   Note: If an establishment works, IPP may use this time to get the routine tasks accomplished that they could not get accomplished during the regular day. Ideally, IPP can complete the higher priority tasks during the normal hours of operations and can use the overtime to perform some of the lower priority tasks on the calendar. IPP can also schedule directed tasks if they have exhausted all of the routine tasks on task list. In all cases, IPP need to indicate whether all or part of the task was performed on overtime. When IPP enter the results of the inspection task on the Inspection Results page, they click the "Activity" tab and check the "All or part of this task was performed on reimbursable overtime" box and then click "**Save**".

2. IPP are to use their knowledge of any additional inspection duties to schedule tasks at times when they expect to be able to complete them.

3. IPP are to avoid predictable patterns of scheduling tasks as much as possible. IPP are to schedule tasks on different days of the week throughout each month to prevent establishments from being able to predict when certain tasks will occur.

4. In cases where IPP become aware that they will not be able to complete all the tasks for the month, they are to give preference to higher priority tasks.

5. In multi-inspector assignments, IPP are to coordinate their efforts to ensure that each inspector understands which tasks are his or her responsibility.

   Note: When multiple IPP perform the *same* verification activity on the *same* shift:
   - One IPP schedules the routine task, performs it, and records the results, and
   - The other IPP schedules a directed instance of the routine task, performs it, and records the results.

For example, the SPHV/IIC in a slaughter processing combination establishment may assign multiple IPP to perform sanitation verification tasks. One IPP performs a Pre-operational SSOP task for slaughter operations and the other IPP performs a Pre-operational SSOP task for processing operations.

6. IPP should not schedule too many tasks on a given day for the assignment or too many tasks in an individual establishment on a given day.

   The "month view" and filtering on "all establishments" on the task calendar page of PHIS allows IPP to view **all of the tasks** on the calendar for **the entire assignment** for a given day. However, using the "month view" and filtering on "all establishments" does not display the specific tasks scheduled at or **the total number of tasks scheduled on a given day at each establishment.**

   To ensure that they do not schedule too much work (too many tasks) in an establishment on a given day, IPP in assignments with multiple establishments may want to build the task calendar one establishment at a time. Once the routine tasks are added to the task calendar for one establishment (whether the calendar is built monthly or weekly), IPP can use the **print function** on the task calendar page and print the task calendar for that establishment. While looking at the number of tasks scheduled at the first establishment, IPP add routine tasks to the second establishment's task calendar making sure not to add too many tasks **on the same day** they scheduled tasks in the first establishment. IPP must also be aware that if there are more than two establishments on the assignment, more tasks still have to be scheduled in other establishments. As each establishment's task calendar is built, IPP may print it and reference it as the next establishment's task calendar is built. **Some work (a task or tasks) should be scheduled in each establishment for each shift that is operating**.

   For example, on a particular day, two tasks are scheduled at establishment A, four tasks are scheduled at establishment B, and three tasks are scheduled at establishment C. On a different day, three tasks are scheduled in establishment A, one task is scheduled in establishment B, and five tasks are scheduled in establishment C. This method of preparing the task calendar for multiple establishments on the assignment continues, following the five scheduling principles above, until all the days in month have assigned tasks. Using this scheduling approach may assist IPP in managing their workload.

When directed tasks or sampling tasks appear in the task list, IPP schedule them on the calendar following the same 6 principles for scheduling routine tasks listed above. Some directed and sampling tasks will have an end date before the end

of the current month. IPP are to ensure that they schedule directed or sampling tasks so that they can be completed before the applicable end dates. IPP must consider the priorities of the new directed, sampling, and export certification tasks relative to the tasks they have already scheduled on the calendar to ensure that they still complete the highest priority tasks by the end of the month.

If IPP determine that they will not be able to complete all high priority tasks or all directed tasks by the applicable end dates, they are to discuss the situation with their immediate supervisor as soon as possible. The supervisor will be able to advise IPP on how to best arrange the necessary tasks or may be able to spread the necessary work to other IPP.

Note: Supervisors need to take an active role in observing the schedules created by IPP and ensuring the work gets done.

Removing/Re-Scheduling Inspection Tasks

At the beginning of each work week, IPP should ask establishment management what operations will be conducted and what products will be produced during the week. Based on the information provided by the establishment, IPP may need move, or remove and reschedule inspection tasks. Even when IPP are familiar with the establishment's operating schedule, an unforeseen issue may occur which prevents them from performing some of the tasks on the day they are scheduled. IPP should use the task calendar page to reschedule those tasks for later in the month if the task's end date allows rescheduling it. If all of the work cannot be performed on a given day due to the addition of directed tasks, sampling tasks or export certification requests, IPP should adjust the task calendar by moving tasks to another day.

Reassigning Inspection Tasks

IPP assigned to the same establishment are expected to coordinate work efforts. This may require reassigning and completing tasks on the task calendar that **have not been started** and tasks that have been started (in-progress) but **not completed** from each another. Some tasks may not have been completed upon rotation of IPP. The newly assigned IPP will need to reassign those unfinished tasks to himself or herself so they can be completed. Relief IPP are expected to reassign and complete tasks that have been started by the regularly assigned IPP, if possible, while they are temporarily covering the assignment. When the IPP reassigns a task to himself or herself that has been started by another IPP, he or she will have to "unlock" the inspection result and provide a "justification." Supervisors are to assist in ensuring that tasks are being completed and the tasks (work) is evenly distributed between IPP assigned to the same establishments.

Note: An IPP cannot assign a task (work) to another IPP but an IPP can take a task (work) assigned to another IPP.

Goal for Completing Inspection Tasks

The ideal situation or overall goal is that IPP complete all routine tasks for the month. In this case, the number of completed tasks would equal the number of planned tasks by the end of the month.

Planned = # Scheduled = # Completed

Designating Tasks as "Not Performed"

The ideal situation or overall goal is that IPP complete all the routine tasks for the month *(i.e., the number of completed tasks matches the number of expected or planned tasks at the end of the month).* Even though IPP have scheduled all of the expected tasks, there are going to be times when they cannot perform all them by the end of the month. Those tasks that are still on the task calendar that have not been started by the end of the month are marked as "not performed". IPP must select the appropriate "justification" for not performing the task from a drop down list in PHIS. Thus, at the end of the month, IPP account for all of the expected instances of a task that were on the establishment's task list in one way or another.

The IPP may mark a task as "not performed" and select the appropriate "justification" whenever it becomes apparent that they will not be able to perform the task before its end date. However, IPP must keep in mind the principles in FSIS Directive 13,000.1 when deciding to mark a task as "not performed." IPP must give preference to completing higher priority inspection tasks, if they cannot complete all tasks for an assignment. If IPP cannot complete a task on the day they scheduled it, and there is still time before the task's end date, IPP are to do the following, in order:

- Reschedule the task on another day before the task end date,

- Look for a lower-priority task on another day before the task end date and replace it with the rescheduled higher priority task.

- In assignments covered by more than one IPP, bring it to the attention of the supervisor, who may assign the task to another inspector who has time to perform the task before the end date. If so, the supervisor is to instruct the other inspector to edit the task in PHIS to reassign the task to himself or herself.

- If there is no opportunity to perform the task before the task end date, then mark it as "not performed" and select a reason.

    Note: Once a task is designated as "not performed" it cannot be opened or unlocked.

Because most routine inspection tasks have task end dates on the last day of the month, the most likely scenario is that IPP will mark any remaining tasks that have not been started as "not performed" on the last day of the month or near the end of the month – after the opportunity for rescheduling the tasks has been exhausted.

Coverage Assignments

PHIS maintains information about IPP in-plant assignments. The information available to the IPP is limited to his/her work assignments. However, IPP often cover assignments other than their permanent assignment. The most obvious example is relief inspectors, but other IPP will temporarily cover an assignment that is not their assignment. To access and interact with PHIS while temporarily covering another employee's inspection duties, IPP must be designated as covering that assignment in PHIS. The temporary coverage does not disrupt the permanent assignment structure, but allows IPP to enter information into the system for the coverage assignment. A coverage assignment can be set up within PHIS on a long term basis and only used when needed, or it can be set up only when the coverage occurs. There are two mechanisms in PHIS to designate a coverage assignment.

At the district office level, the resource management analyst (RMA) can directly designate individual employees to provide coverage in the Assignments page of PHIS. When coverage of an assignment has been predetermined like temporary duty assignments for relief inspectors or coverage for pre-approved leave periods, the RMA adds the applicable employees to the coverage assignments within the resource management role of PHIS.

For more **immediate and unforeseen** situations that necessitate temporary coverage of another employee's assignment, IPP use the "Coverage Assignments" left navigation menu to access the Coverage Assignment page to select the specified assignments and add them to their coverage list.

When one or more coverage assignments have been set up for an IPP, whether by the RMA or by the inspector, those covered assignments will be available to that inspector through the PHIS task calendar and Inspection Verification left navigation menus. On the **Task Calendar** page, IPP use the "Assignments" filter

at the top of the Establishment Task List panel to select an assignment from the available choices. The establishment task list and task calendar will then display the information for that assignment and allow the inspector to schedule tasks and enter results for that assignment. When IPP are finished covering the temporary assignment, they are to use the "Assignments" filter again to select their regular assignment.

When providing coverage, the IPP is fully empowered to perform verification activities in the establishment or the assignment as the regularly assigned IPP. They are to review the tasks already scheduled for that assignment and the remaining tasks on the task list and make sure they complete tasks that are already in-progress (open tasks) as well as tasks that are not yet started (not opened or not scheduled yet), focusing first on the higher priority tasks. If IPP are covering multiple assignments at the same time, they are to ensure that they focus on the highest priority tasks first and then complete lower priority tasks if time permits.

PHIS Daily Activities to Ensure Tasks are Scheduled and Performed

When Logging in to PHIS for the First Time during the Work Day, IPP should (in this order):

1. Review any new alerts on the dashboard of the homepage. The alerts:

   - Are generated automatically based on data entered into the system and events that occur in the establishment
   - Provide IPP with urgent or critical information
   - May direct IPP to perform additional inspection tasks or take other action

2. Review each establishment's task list to find any new directed tasks. Directed inspection tasks:

   - Are generated automatically based on data entered into the system
   - May be generated by supervision, the District Office, or Headquarters

3. Review each establishment's task list to find any new sampling tasks.

4. If the establishment exports product, determine if there are any new export requests.

5. Review the task calendar to see what inspection tasks are already scheduled for the week or month.

6. Add any new directed inspection tasks/sampling tasks/export requests to the task calendar.

   IPP are to consider the priorities of the new tasks relative to the tasks already scheduled on the calendar to ensure that they still complete the most important tasks by the end of the month. For sampling tasks, they need to plan ahead to ensure they can collect the sample during the designated time period.

7. Adjust the task calendar, if the work cannot all be performed on a given day due the addition of directed inspection tasks/sampling tasks/export requests.

8. Review any open NRs to determine if they can verify that the establishment has brought itself back into compliance while performing inspection tasks.

Hands-on Activity

The following hands-on section is intended to provide familiarity and experience with the PHIS task calendar that is used to schedule and document the results of inspection tasks performed by IPP. In the first hands-on activity, you will learn to navigate the features of the PHIS Task Calendar page using Groveton, small grinding establishment, as the example establishment. For the second hands-on activity, you will schedule tasks for Holland Point Foods which is a large establishment that prepares RTE deli lunch meat and hot dog products. For the last hands-on activity, you will designate days as active and inactive, remove, reschedule, reassign tasks, and schedule directed tasks for Open Beef, Inc., a beef slaughter and processing combination establishment.

For the first hands-on activity, you (as Robert Barclay) will:

- Review the PHIS task calendar page features, and

- Navigate the features of the PHIS task calendar page.

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 Log-in
  - ▪ Select User: **Robert Barclay (#)**

Accessing the Task Calendar Page

To access the Task Calendar page:

1. Click **Task Calendar** in left navigation menu

The Task Calendar page is divided into two sections:

- The Establishment Task List
- The Task Calendar

The Establishment Task List panel (blue title bar) is at the top of the page and the task calendar panel (blue title bar) in the middle of the page.

2. Click the **down arrow** on the right side of the screen to Scroll Down and observe the task calendar
3. Click the **up arrow** on the right side of the screen to Scroll Up to top of the calendar page

Establishment Task List Navigation

The Establishment Task List panel can be expanded or hidden to make more room on the screen for viewing the Task Calendar.

4. Click on the **Double Arrow** in the Establishment Task List panel to **Close** (hide) and click it again to **Open** the task list

When IPP have inspection responsibilities in multiple assignments (e.g., a coverage assignment and their own assignment), they use the **Assignments filter** to select between specific assignments. This temporary coverage does not disrupt the permanent assignment structure, but allows them to schedule tasks and enter task results for that assignment. The drop-down list represents the Business unit, i.e., OFO, the District Office, circuit, and the specific assignment.

When the IPP selects a different assignment the establishment names change in the Establishment Filter ("Select Establishments" box). The establishments that are displayed in the establishment filter ("Select Establishments" box) list are based on the assignment selected in the Assignments filter. The establishments are listed in alphabetical order.

5. Click on the drop-down list arrow for **Assignments** filter
6. Select (highlight and click) **Alameda 0599-01-#**
   - Open Beef replaces Groveton in the Select Establishment box
7. Reselect **Alameda 0597-01-01** by repeating step 5 and selecting it

The routine tasks that IPP perform are filtered by the establishment or set of establishments in the assignment. Routine tasks in the list for an establishment are based on the establishment's processes and operations, and the finished products shipped from the establishment. This information was entered into the establishment's profile.

8. Click the **drop-down list arrow** for the "Select Establishments" box to **Select** a specific establishment
   - There are two establishments in this assignment: Groveton and Holland Point Foods
   - Selecting Holland Point Foods would display the routine tasks for this establishment for the 60 day period or the IPP selected date range

The tasks displayed for an establishment are based on the type of tasks selected in the "**Filter Task by"** drop-down list, e.g., Domestic, Export (not functional in PHIS at this time), Import, and Lab Sampling**.** The "default view" for the establishment task list is "**Domestic."**

9. Click the **drop-down list arrow** for "Filter Task by" to **Select** lab sampling, export (when functional), or import
   - Scrolling down and highlighting and clicking on **Lab Sampling** would bring up any directed lab sampling tasks for Groveton

The establishment task list will list the current month and the next month's routine tasks (60 days) to be performed for the each establishment. IPP may want to review previous months' tasks that were scheduled and performed, or just the current month's task to be scheduled and performed, or only next month's tasks to be scheduled and performed.

10. Click the **Calendar icons**
    - Calendar Widget Navigation
      - The single left arrow moves the month backward and the single right arrow moves the month forward
      - Left double arrow moves the calendar back 3 months and right double arrow moves to the calendar forward 3 months

11. Change the date range to "**December 1, 2015** to **December 31, 2015** (click the first calendar icon, then click the small left arrow to bring up the previous month and select the day (1); then click the second calendar icon, then click the small left arrow twice and select the day (31))

12. Click the **Refresh Tasks** button
    - Only the tasks for the month of December are displayed
13. Change the date range to **February 1, 2016** to **February 29, 2016** (repeat steps 11 and 12 except click the small single right arrow twice and then select the day when the calendar opens, click **Refresh Tasks** button)
14. Reset the date range from **January 1** to **February 29**, then click the **Refresh Tasks** button

The Establishment Task List has specific features which include:

- Task name: IPP can refer to Attachment 1 to see all the task names in the task library.

- Task priority level: In situations where IPP know that they will not be able to complete all of the tasks in a given month, they are to use the priority scale to decide which tasks are more important to complete. Lower numerical priority values indicate more important tasks. In other words, it is more important to complete a priority 2 task than a priority 6 task. At the end of the month, the tasks that remain incomplete should generally be the lowest priority tasks.

- Task start date/end date: These dates show the period during which the inspection task is to be performed based on its frequency. For most tasks the date range will correspond to a single month. For other tasks, the date range may include 3 months. IPP schedule the specified number of instances of the task before the stated end date. The task list displays tasks for the current month and the next month.

- Expected/planned number of tasks: PHIS will consider the establishment's approved operating hours and the intended frequency of each task to calculate how many instances of each task will be on the task list for the month.

- Number of scheduled tasks: As IPP schedule instances of each inspection task on the calendar, this field will keep track of how many have been scheduled.

- Task category: Indicates whether the task is a routine task or a directed task.

- Number of tasks completed/done: As IPP perform their inspection tasks and enter results, the tasks will be designated as done. As the tasks are marked complete on the inspection results page of PHIS, the "number done" field will track them.

- Task "add" link: This link is used to schedule both routine and directed tasks on the task calendar.

The tasks on the task list can be narrowed by entering criteria such as the task name (or part of the task name), priority level, and task category in the filter boxes below the column headings. After typing in the filter criteria, IPP must click the filter icon (looks like a funnel) and select how they want the criteria to be applied. The tasks that are displayed on the Establishment Task list are based on the criteria entered.

15. Type **HACCP** in task name filter box
16. Click the **Filter icon**
17. Click **Contains** from the pick list
    - Only the HACCP tasks are listed

18. Click the **Refresh Tasks** button
    - The filter criteria is erased

Note: If IPP want to review just the HACCP verification tasks for the current month, they need to narrow the date range **before filtering** using the word HACCP. Clicking on the Refresh Tasks button when the IPP narrows the date range *also* refreshes the task list filters.

19. Type in the number **3** in the priority filter box
20. Click the **Filter** icon
21. Click **LessThanOrEqualTo** from the pick list
22. Click on the down arrow or **Scroll** down
    - Only priority 2 or 3 tasks are listed
23. Click the **Refresh Tasks** button
24. Type in the letter **D** in the category filter box
25. Click the **Filter icon**
26. Click **StartsWith** from the pick list
    - Only directed tasks are listed
27. Click the **Refresh Tasks** button

The blue **"Add"** link is used to add the task to the task calendar. A specific task can be added as a routine task or as directed instance of that task. When the "Add" link is missing, the IPP has already scheduled or completed the expected or planned number instances of that routine or directed task. If a one of the scheduled task is removed from the calendar then the "Add" link would reappear.

28. Find the **Operational SSOP Review and Observation task** in the task list for January by scrolling down or filtering using SSOP
29. Click the **Add** link in the routine column

The calendar month popup browser opens, showing the establishment name, task code/name, active period (start and end dates for the task) and remaining number of tasks to schedule. The calendar displays the days for IPP to **randomly** select and schedule the task. The available days reflect the establishment's anticipated operating schedule

IPP can schedule one task, several tasks, all of the remaining routine tasks for the month at once time by entering the desired number of tasks in each day box of the calendar popup window. IPP can also schedule as many **directed instances** of a task by the same method. However, IPP will only be able to add multiple directed tasks with the **same justification or reason** on the calendar from the list.

30. Check the **Small Box for Tuesday** and type a **"1"** in the **Red Highlighted Box** and left click the **Small Box for Tuesday again**
    - This will schedule the Operational SSOP Review and Observation task for every Tuesday of the month; notice the grayed out "1" in the box for every Tuesday of the month
31. Click **Cancel**

Note: To add the task to the calendar you would have clicked the "Save" rather than "Cancel". You will add tasks to the IPP's calendar in the next hands-on activity.

32. Click the **Add** link in the routine column for the **Operational SSOP Review and Observation task** for **January** again
33. Type a **"1"** in the box for January 4, 6, 11, 18, 22, 25, 26 and 28
    - This will schedule the Operational SSOP Review and Observation task on the IPP's task calendar for the selected days
34. Click **Cancel**
35. Scroll down until the **Task Calendar panel** is at the top of the screen

Task Calendar Navigation

The task calendar displays **all** of the tasks scheduled for **all** IPP and **all** establishments in the assignment. Tasks displayed on the calendar may be listed (filtered) by IPP name and/or establishment. IPP can document the results for inspection tasks directly from the task calendar using the **Task Menu**. The calendar has a "drag and drop" feature for easily moving scheduled **domestic** tasks to another day on the IPP's task calendar. IPP use the task calendar to identify days that the establishment does not normally work as operating days. They also identified approved operating days as non-workdays whenever establishment decides not to conduct operations.
The tasks on the calendar are identified by:

- task name,
- establishment number, and
- the IPP that is assigned to perform the task.

The task calendar page utilizes colors for designating the current month's operating days as "active" or "inactive", identifying the previous month's days, and identifying the upcoming month's days. IPP may schedule tasks on active days but cannot schedule tasks on days designated as inactive. It also uses symbols and colors to designate the status of a particular task on the calendar. The color coding makes it easy for IPP to recognize which days are "active" and which days are "inactive," and the status of the task in PHIS.

Color designations for the days on the calendar include:

- Next/Prior Month Days
  - light gray (in the month view)
- Saturday/Sunday/Inactive Operating Days
  - light blue
- Active Days
  - no shading

Statuses of scheduled tasks on the Task Calendar include:

- **Not opened** – This is a task that has been scheduled onto the task calendar, but IPP have not begun to enter results in PHIS. This task with have a blue shaded box with the task, establishment number and name, and IPP name.

- **Open** – This is a task that has been scheduled onto the task calendar and IPP have begun to enter results. This task will have a yellow shaded box with a green circular arrow in top left corner of the box.

- **Completed** – This is a task that has been scheduled onto the task calendar and finished. IPP have performed all necessary verification and entered all results in PHIS. This task will have a green shaded box and a green check mark in top left corner of the box.

- **Not performed** – This is a task from the Establishment Task List that has been scheduled onto the Task Calendar but IPP had not begun to enter results by the end of the scheduled period. This task will have a red shaded box and a red "x" in top left corner of the box.

The default view (the first time the task calendar is accessed) for the tasks on the task calendar is **all** inspectors and **all** establishments. By using the filters, IPP can view the tasks to be performed by each inspector during the month or all of the tasks to be performed at a specific establishment during the month.

36. Click the drop-down list arrow for the **Inspector**
37. Click the drop-down list arrow for the **Establishment**

The task calendar has **3 date views**.

- Month- shows tasks for the month (which is the default)
- Week-shows tasks for the week
- Day-shows tasks for a particular day

Each date view uses the IPP's name and the establishment name to limit the tasks displayed.

38. Click the left arrow in the upper left corner of the calendar to see the scheduled tasks (completed, in progress and not opened) for **December, 2015**
39. Click the right arrow in the upper left corner of the calendar, then click it again, to see the scheduled tasks for **February**
40. Click the left arrow in the upper left corner of the calendar to return to **January** (current month view)
41. Click the **Week** link to see the tasks for the first week of the month
42. Click the left arrow in the upper left corner of the calendar to see just the **previous Week's** scheduled tasks
43. Click the right arrow in the upper left corner of the calendar, then click it again, to see just the scheduled tasks for the **next Week**
44. Click the **Today** link to see the tasks scheduled for the **Current Day**
45. Click the left arrow in the upper left corner of the calendar to see the tasks scheduled **Yesterday**
46. Click the right arrow in the upper left corner of the calendar, then click it again to see the tasks scheduled for **Tomorrow**
47. Click the **Calendar** icon (by the **Today** link)
48. Click the left arrow to bring up the month of **December**
49. Click **December 22, 2015** to see the scheduled tasks for that specific day

There are several options in PHIS for printing the task calendar list.

50. Click the **Printer Icon**
    - A pop-up window displays all the scheduled tasks for the assignment during the month regardless of which calendar date view has been selected (day, week, or month)
    - The list displayed can be sorted by using the **Report filters** at the top of the screen
51. Type **Holland Point** in the establishment name box
52. Click the drop down list arrow for the **Task Name**
53. Click **Operational SSOP Review and Observation**
54. Click the **Refresh Button**
    - Only the scheduled Operational SSOP Review and Observation tasks for Holland Point Foods are displayed for the date range
55. Click the **Clear Button**
    - All report filter criteria is cleared except the "Group by" filter
    - Select "none" to reset the Group by filter
56. Click the **Refresh Button**

- The original display is reset (all tasks and all establishments) for the date range
57. Click the drop-down list arrow for the **Task Status**
58. Click the drop-down list arrow for the **Group by** filter
59. Click **Day, Establishment**
    - The scheduled tasks are now displayed by day and establishment
60. Click the **Printer Icon** to print the list (not functional in training)
61. Click **Cancel** in print window

The task calendar list can be saved to the hard drive of the IPP's computer's as a PDF, MS excel or MS word file for further reference.

62. Click the **PDF** icon
63. Click the **Open** button to open the file
64. Click the **File** in the upper left corner
65. Click **Save As** in the menu
66. Rename the file by typing **January Task List** in the file name box
67. Click the **Save** button
68. Click the **Red X** to close the form window
69. Click the **Black X** (top right corner) to close the print pop-up window

Once a task has been added to the calendar, there are several operations that IPP can performed on that task. For instance, the task start date can be changed, the results of the task can be documented, or the task can be removed from the calendar. To perform such operations, IPP will use the **Task Menu.**

70. Click the **Month** link
71. Click the right arrow to see the scheduled tasks for January
72. Find the **General Labeling** task on the task calendar for **January 25, 2016**
73. <u>Right</u> click the **General Labeling** task to bring up the Task Menu
74. Click **Information**-brings up the guidance pop-up window
75. Click the **Black X** (top right corner) of the pop-up window to close it
76. <u>Right</u> click the **General Labeling** task to bring up the Task Menu
77. Click **Justification**-brings up the page for designating a task as **"not performed"**
78. Click the **drop-down list arrow** for the justification box
    - Brings up the "not performed" choices

      Note: You will designate this task as "not performed" in the next hands-on activity.

79. Click the **Close** button

80. <u>Right</u> click the **General Labeling** task to bring up the Task Menu
81. Click **Document**-brings up the **Inspection Results** page

> **Note:** You will document inspection results later in this training session.

82. Click the **Close** button
83. Select **Groveton Meats** in the establishment filter list
84. <u>Right</u> click the **General Labeling** task to bring up the Task Menu
85. Click **Edit**-brings up the **Edit Establishment Task list** page
    - The IPP can review task details such as the establishment, task category, start/end dates, number planned, number scheduled, and priority level on this page
    - The IPP can change the date the task will be performed on this page
    - The IPP can reassign a task previously assigned to another IPP to himself or herself

86. Click the **Cancel** button
87. <u>Right</u> click the **General Labeling** task to bring up the Task Menu
    - Clicking **Remove,** removes the task from the calendar and puts it back on the task list
    - The task still needs to be performed by the defined end date
      Note: Removing tasks from the task calendar is demonstrated in the third hands-on activity.

The **Task Menu** selections are different for an in-progress, completed, and not performed task. The "**Information"** selection is the same as previously discussed, e.g., lists relevant FSIS Directives. The **"Remove"** selection is gone. A task that is in-progress (has been started), completed or designated as not performed cannot be removed from the calendar. The **"Edit"** selection has been replaced with a **"Review"** selection. IPP can still review the tasks details but they cannot change the task date or assign a task **completed** by another IPP to himself or herself anymore. A task that is in-progress may be reassigned from one IPP to another IPP or edited, and a completed task may be edited using the "**Document"** selection. If a change is made to the task by an IPP who did not start the task or complete the task, PHIS requires that the IPP provide a "justification" or reason for making the change to the task.

88. Find the **Raw Non-Intact HACCP Task** that is **Completed** (green) for **January 22, 2016**
89. <u>Right</u> click on the **Raw Non-Intact HACCP Task** to bring up the Task Menu
90. Click **Review**

- The task details are displayed but notice the date box is grayed out and there is no save button
91. Click the **Go Back** button
92. Right click again on the **Raw Non-Intact HACCP Task** to bring up the task menu
93. Click **Document**
    - The Inspection Results page is displayed where IPP could make changes to the entries
94. Click the **Close** button

For the first part of this hands-on activity, you (as Robert Barclay) will perform the following task calendar management:

- Review the establishment task list and schedule high priority tasks (level 2, 3, and 4), and

- Designate a **General Labeling** task scheduled for December 30, 2015 as "not performed" because of IPP time constraints.

Scheduling Tasks

IPP use the expected frequency of each task and the task's priority level from the Establishment Task List, and their knowledge of the establishment's operations to schedule their inspection tasks. When scheduling tasks on the calendar, they follow the 6 principles for scheduling tasks that were previously discussed.

1. Scroll up to the **Establishment Task List Panel** (blue bar)
2. Click the drop-down arrow and select **Holland Point Foods** as the establishment
3. Click the **Calendar icon** to the right of the "To Date"
4. Click the small single left arrow and select **January 31, 2016** and click the **Refresh Tasks** button
5. Type **SSOP** in the task name filter
6. Click the **Filter icon**
7. Click **Contains** in the pick list
8. Find the **Operational SSOP Review and Observation** task on the task list
9. Review the data displayed in the task list for this task
    - The number planned, number scheduled and number done
10. Click the **Add** link in the routine column for the **Operational SSOP Review and Observation** task
11. Type the number **"1"** in the box for **January 27th and 29th** in the task calendar pop-up window

12. Click the **Save** button
13. Inspect the **# Sch** column for the task that you just scheduled, **Operational SSOP Review and Observation,** ensuring that the value has been increased by two
14. Continue scheduling the following priority 2 tasks using the same process in steps 10 and 11:
    - Operational SSOP Record Review task on January 28, 2016
    - Pre-Op SSOP Record Review task on January 28, 2016
    - Pre-Op SSOP Review and Observation task on January 28, 2016

Note: PHIS tracks the normal number of hours for a workday. As the IPP schedules tasks on the calendar for an individual day, the system checks to see if there is enough time to perform all them. PHIS will issue a warning if the number of tasks scheduled for an IPP for one day exceeds the normal workload for a day. The error is only a warning and does not preclude the inspector from scheduling as many tasks as they see appropriate for a day.

15. Click the **Refresh Tasks** button
16. Type a **3** in the Priority Level filter
17. Click the **Filter icon**
18. Click **GreaterThanOrEqualTo** to list only priority 3, 4, 5 and 6 level tasks
19. Schedule the following priority 4 and 6 level tasks using the same process in steps 10 and 11:
    - Labeling Product Standards task on January 27, 2016
    - Fully Cooked Not Shelf Stable HACCP task on January 27, 2016
20. Scroll down to the **Task Calendar**
21. Click the **Today** link, then click the **Week View** and view the 7 tasks you just added to the calendar

Rather than removing a task from the calendar and rescheduling it, a scheduled **domestic** task can be easily moved to a different day in the Week or Month view by using the drag and drop feature. A check box enables the IPP turn on or off the ability to reschedule tasks on the calendar by dragging and dropping them.

Note: Sampling and export certification tasks should not be moved using the "drag and drop" calendar feature. These tasks must be cancelled and rescheduled.

22. Select **Holland Point Foods** in the establishment filter list

23. Click the small box next to **Enable Drag and Drop** to move a task to different day
24. Left click and hold down on the **Pre-Op SSOP Record Review** task scheduled on **January 28, 2016** and drag it to **January 27, 2016**
25. Click the box again to **Disable Drag and Drop**
26. Filter the calendar by Inspector **Robert Barclay** and the Establishment **All,** then click the **Month** view to see only Robert Barclay's tasks at all establishments for **January 2016**
27. Filter the calendar by Establishment **Groveton** to see only Robert Barclay's tasks scheduled at Groveton for the **January 2016**
28. Filter the task calendar by Inspector **Robert Barclay** and the **Establishment Holland Point Foods**
29. Click the **Today** link to see the tasks for the current day on the calendar at Holland Point Foods

For the second part of this hands-on activity, you (as Robert Barclay) will designate a task as "not performed" on the calendar.

Designating Tasks as Not Performed

At the end of each month, IPP designate any tasks that were not completed as "not performed" and provide a justification or reason for not performing the task in PHIS.

1. Click **Month** view to see all the tasks on the calendar for the month
2. Click the left arrow to see the scheduled tasks (completed, in progress and not opened) for **December**
3. Right-click the **General Labeling** task scheduled on **December 30, 2015**
4. Select **Justification** from the task menu
5. Click the Justification drop-down list arrow, click **Assigned Other Duties**
6. Type the comment "**Coverage Assignment**" (Optional)
7. Click the **Save** button
8. Click the **Close** button
9. **Sign out** of PHIS

For the last hands-on activity, you (as Jeb Morwork) will perform the following task calendar management:

- Set February 26, 2016 as inactive because the establishment will be closed due to equipment updates,

- Set January 30, 2016 as active because it has more orders to fill for the month,

- Reassign priority 1, 2 and 3 tasks from Robert Allen to his own schedule because Robert Allen has gone on emergency leave,

- Reassign a task that Robert Allen started the day before he went on leave,

- Remove and reschedule tasks on his own schedule (based on priority level) to make time for the extra tasks he took from Robert Allen, and

- Add 2 "directed tasks" to the calendar.

We need to change assignments and access the task calendar by doing the following:

1. Log into PHIS and Select User **Jeb Morwork (your #)**
2. Select **Task Calendar** from the navigation menu
3. Scroll down to the **Task Calendar Panel**
4. Filter the calendar by Inspector **All** and the establishment **Open Beef**

Designating Non-Workdays as Active and Approved Workdays as Inactive

If an establishment chooses not to operate on one or more of their approved operating days, IPP will mark those days as "inactive" on the task calendar. As a result, PHIS re-calculates the expected number of tasks based on the new number of operating days for the month. For example, an establishment is approved to operate Monday through Friday, 6 a.m. to 2:30 p.m. However, during the winter, the establishment receives fewer orders; so management elects not to operate on Fridays in December and January. The inspector assigned to this establishment marks those Fridays as "inactive" on the task calendar. Therefore, PHIS adds fewer instances of each inspection task to the establishment task list for the months of December and January. Likewise, days that are not normal operating days (e.g., Saturday overtime) need to be "activated" so tasks may be scheduled on those days.

5. Click **Active/Inactive** icon (calendar and clock)
6. Manually type in **1/30/2016** in the date box or click the calendar icon and select this date
7. Mark **Day as Active** is already selected in drop-down list, so click the **Save** button
   - Notice that the box for 1/30/2016 changed from light blue to white which indicates an active day

Note: Routine tasks can now be scheduled on Saturday January 30, 2016. If all of the routine instances of a particular task have already been scheduled for the month, the IPP can perform a directed instance of that task on Saturday January 30, 2016. During overtime hours, regardless if IPP perform a routine or a directed task, they need to indicate whether all or part of the task was performed on overtime.

8. Click **Active/Inactive** icon (calendar and clock)
9. Manually type in the **2/26/2016** in the date box or click the calendar icon and select this date
10. If you use the calendar, click the single right arrow and select **2/26/2016**
11. Click the **Drop-Down List Arrow**, then click **Mark Day as Inactive**
12. Click the **Save** button
    - The box for 2/26/2016 changes from white to light blue which indicates an inactive day
    - Tasks cannot be scheduled on inactive days, e.g., on 2/26/2016

Reassigning Scheduled Tasks

There will be occasions when IPP will need to provide temporary coverage at another assignment or perform tasks assigned to other IPP in the same assignment due to emergency situations. IPP are to reassign high priority tasks from the other assignment or the other IPP in the same assignment to their task calendar.

1. Filter the calendar by Inspector **Robert Allen** and the establishment **Open Beef**
2. View Robert's scheduled tasks for **January 28 and 29, 2016**, the two days that he is on emergency leave
3. Right click on Robert's task **Operational SSOP Review and Observation** scheduled for 1/28/2016 and then click **Edit** from the Task Menu
4. In the Edit screen, note that the task that was assigned to Robert will now be assigned to Jeb, then click the **Save** button
5. Continue to reassign Robert Allen's priority 2 and 3 tasks (listed below) on **1/28/2016 and 1/29/2016** to yourself, Jeb Morwork, using the same process as steps 3 and 4
    - Operational SSOP Record Review task on **1/29/2016**
    - Hazard Analysis Verification (HAV) task on **1/28/2016**
6. Set the calendar Inspector filter to **All** so that you can see the tasks that you have reassigned from Robert to yourself (Jeb)

7. <u>Right</u> click on Robert's task **Review Establishment Data** started (yellow, in-progress) on 1/27/2016 and then click **Document** from the Task Menu
   - The Inspection Results page is displayed
8. Click the **Justification** link at the end of the message that appears at the top of the screen
9. Click the Justification drop-down list arrow, then click "**The original Inspector is Unavailable"**
10. Type "Original IPP is on Emergency Leave" in the **Reason to Edit Inspection Result Box**
   - Entering a reason for unlocking the task is mandatory
11. Click the **Unlock** button to save the justification
12. Notice the inspector name in the middle of the page is now **Jeb Morwork** rather Robert Allen
13. Scroll to the bottom of the page, there is a grid with a **justification, reason to edit, who made the edit, and date**
14. Click the **Close** button

   Note: The name of the IPP that scheduled the task (in this case Robert Allen) does not change to Jeb Morwork on the task calendar. The task remains yellow (in-progress) until an IPP checks the "inspection task completed" box.

Removing Scheduled Tasks and Rescheduling Tasks

The task calendar allows flexibility to remove and reschedule tasks during the month to adapt to changing conditions as necessary. In this case, Jeb Morwork has to cover for Robert Allen who is on emergency leave. Jeb has reassigned high priority tasks from Robert Allen's task calendar to his calendar for the time Robert Allen is on leave. Since Jeb added some of Robert's tasks to his calendar he cannot perform all scheduled tasks on his calendar. Now, Jeb has to adjust his task calendar by moving tasks to another day or by removing some tasks from his calendar to be rescheduled at a later date based on task priority.

1. Filter the calendar by Inspector **Jeb Morwork** and the establishment **Open Beef**
2. <u>Right</u> click on the task **Slaughter HACCP** task scheduled for 1/28/2016 and then click **Edit**
3. Click the **Calendar icon** and select 1/30/2016
4. Click **Save** button and ensure that this task is on the calendar for 1/30/2016
5. Filter **Task List** by the establishment **Open Beef** (should already be selected)

6. Filter the task list for January tasks by clicking the calendar icon next to the **To: Date Box,** clicking the small left single arrow and then selecting 1/31/2016
7. Click the **Refresh Tasks** button
8. Type **Raw** in task name filter box
9. Click the **Filter icon**
10. Click **Contains** from the pick list
11. Find the **Raw Intact HACCP** task in the task list and look at the value in the # Plan column and the value in the # Sch column
12. Now scroll down, <u>right</u> click on the task **Raw Intact HACCP** task scheduled for 1/29/2016 and then click **Remove**
13. Review the calendar to ensure that this task is no longer displayed on the calendar for 1/29/2016
14. Scroll up and review the task list and notice that the value in # Sch column decreased by 1
15. Click the **Refresh Tasks** button

Adding Directed Tasks

Directed inspection tasks may be initiated in several ways. In some cases, PHIS will automatically add a directed task to the task list in response to certain information, e.g., a noncompliance entry or lab results within the system. IPP are to initiate directed procedures when they have a reason to perform an additional instance of a routine task. In other words, IPP are to initiate an additional instance of one or more of the routine tasks in the calendar task list when they are instructed to perform a task at a higher frequency than the routine frequency in PHIS, e.g., for poultry zero tolerance verification. In addition, IPP also initiate a directed instance of the routine task based on conditions they observe in the establishment, e.g., noncompliance with regulatory requirements.

For this part of the hands-on activity, Jeb Morwork will add a:

- Pre-Operational SSOP Review and Observation verification task as a directed task based on policy instruction.

- Sanitation Performance Standard (SPS) verification task as a directed task because he observed noncompliance with regulatory requirements

  1. Type **SSOP** in task name filter box
  2. Click the **Filter icon**
  3. Click **Contains** from the pick list
  4. Click the **Add** link in the directed column for the **Pre-Op SSOP Review and Observation** task

5. Type the number **"1"** in the box for **January 28, 2016** in the task calendar pop-up window
6. Click the drop down list arrow at the bottom of the calendar, then click **Supervisor Instruction** for the reason
    * A justification is required
7. Click the **Save** button
8. Review the task list and confirm that a new directed **Pre-Op SSOP Review and Observation** task is listed (The #Sch is 1)
9. Scroll down and confirm that the directed task is now on the calendar for **1/28/2016**
10. If you are not sure, <u>right</u> click on the task **Pre-Op SSOP Review and Observation** task, then click **Edit**
11. Look for the word **Directed** in the task details
12. Click the **Cancel** button
13. Type **SPS** in task name filter box
14. Click the **Filter icon**
15. Click **Contains** from the pick list
16. Click the **Add** link in the directed column for the **SPS verification task**
17. Type the number **"1"** in the box for **January 28, 2016** in the task calendar pop-up window
18. Click drop down list arrow at the bottom of the calendar, then click **To Document Noncompliance** for the reason
19. Click the **Save** button
20. Review the task list and confirm that a new directed **SPS verification** task is listed (The #Sch is 1)
21. Scroll down and confirm that the directed task is now on the calendar for **1/28/2016**
22. If you are not sure, <u>right</u> click on the task **SPS verification task**, then click **Edit**
23. Look for the word **Directed** in the task details

Sign-Out

Click **Sign Out** and close your laptop at this point because the next topic will begin with policy information and your laptop is not needed.

Establishment Task List and the Task Calendar Workshop

1. Describe the difference between a routine task and a directed task.

2. How are directed tasks initiated?

3. Describe the principles that IPP should follow when scheduling inspection tasks.

4. What is the ultimate goal or ideal situation for completing inspection tasks?

Attachment 1: Prioritization of Procedures

- Priority 1 High
  - Reserved for emergency directed procedures

- Priority 2 High
  - All Verification and Follow up Sampling for
    - *E. coli* O157:H7 sampling in beef products
    - *Listeria monocytogenes* sampling in ready-to-eat products
  - All pre-operational and operational SSOP tasks
  - Humane Handling and Good Commercial Practices Tasks

- Priority 3 Medium
  - Big 8 Formulation verification tasks
  - *Salmonella* Verification and All Other Sampling
  - Sanitation Performance Standards and Sanitary Dressing verification tasks
  - Hazard Analysis verification tasks
  - Zero tolerance verification tasks
  - Food Defense verification tasks
  - Review of Establishment Data verification tasks
  - SRM verification tasks

- Priority 4 Medium
  - Raw, non-intact (i.e. ground) HACCP verification tasks
  - Raw intact HACCP verification tasks
  - Fully cooked, not shelf stable HACCP verification tasks
  - Heat treated, not fully cooked, not shelf stable HACCP verification tasks
  - Slaughter HACCP verification tasks

- Priority 5 Low
  - Thermally processed, commercially sterile (i.e. canning) HACCP tasks
  - Not heat treated, shelf stable HACCP verification tasks
  - Heat treated, shelf stable HACCP verification tasks
  - Secondary Inhibitors HACCP verification tasks
  - Custom/Retail exemption verification tasks
  - Review/Update establishment profile and establishment meetings

- Priority 6 Low
  - Generic *E. coli* verification tasks
  - Economic wholesomeness verification tasks
    - Percent Yield/Shrink
    - X Percent Solution
    - MSS/MSP/PDBFT/PDPFT/PDCB/AMRS
    - Batter/Breading
    - Livestock Finished Product Standards
    - Poultry Finished Product Standards
  - Labeling verification tasks
    - Labeling – Product Standards
    - Child Nutrition/Grade Labeling/Declared Count/Vignette
    - Labeling – Net Weights
    - General Labeling
  - Export tasks

Table 1: Dictionary of Inspection Tasks in PHIS

Inspection Task Name	Inspection Task Description
Pre-Op SSOP Record Review	Pre-operational Sanitation SOP verification by review of establishment records
Pre-Op SSOP Record Review (Import)	Pre-Op Sanitation SOP Verification by review of import establishment records
Pre-Op SSOP Review and Observation	Review the establishment's SSOP and become familiar with the procedures
Pre-Op SSOP Review and Observation (Import)	Review the import establishment's SSOP and become familiar with the procedures
Operational SSOP Record Review	Verify operational SSOP records
Operational SSOP Record Review (Import)	Verify operational SSOP records
Operational SSOP Review and Observation	Verification of the establishment's operational SSOP
Operational SSOP Review and Observation (Import)	Verification of the import establishment's operational SSOP
SPS Verification	Verification of the sanitation performance standards
SPS Verification (Import)	Verification of the sanitation performance standards
Beef Sanitary Dressing	Verify Sanitary Dressing in Livestock Slaughter Establishments
SPS Verification (V)	Verification of sanitation performance standards in voluntary facilities
Generic *E. coli* Verification	Verify the establishment's generic *E. coli* program.
Hazard Analysis Verification	Hazard Analysis Verification for all HACCP categories
Directed Hazard Analysis Verification	Directed HAV procedure is initiated if a public health based threshold has been exceeded (e.g., positive pathogen test results, trend of food safety NCs, or other information that requires follow-up).
Review of Establishment Data	Weekly review of establishment data per Directive 5000.2

Inspection Task Name	Inspection Task Description
Raw Non-Intact HACCP	Verification of all 4 HACCP regulatory requirements through the use of review and observation and recordkeeping components
Raw Intact HACCP	Verification of all 4 HACCP regulatory requirements through the use of review and observation and recordkeeping components
Thermally Processed-Commercially Sterile HACCP	Verification of the 318.300, Subpart G, 381.300, Subpart X; Canning and Canned Products regulatory requirements and HACCP regulatory requirements.
Not Heat Treated-Shelf Stable HACCP	Verification of all 4 HACCP regulatory requirements through the use of review and observation and recordkeeping components
Heat Treated-Shelf Stable HACCP	Verification of all 4 HACCP regulatory requirements through the review and observation and recordkeeping components.
Fully Cooked-Not Shelf Stable HACCP	Verification of all 4 HACCP regulatory requirements through review and observation and recordkeeping components.
Heat Treated-Not Fully Cooked-Not Shelf Stable HACCP	Verification of all 4 HACCP regulatory requirements through use of review/observation and recordkeeping components.
Secondary Inhibitors-Not Shelf Stable HACCP	Verification of all 4 HACCP regulatory requirements through the use of review/observation and recordkeeping components.
Slaughter HACCP	Verification of all 4 HACCP regulatory requirements through the review/observation and recordkeeping components.
SRM Control Verification	Verify establishments effectively remove, segregate, and dispose of SRMs for s selected lot of product.
Livestock Zero Tolerance Verification	Verification of zero tolerance for feces, milk, ingesta on livestock carcasses
Poultry Zero Tolerance Verification	Verification of zero tolerance for feces on poultry carcasses entering chilling system.
Percent Yield/Shrink	Verify certain products that have a specified %Yield/Shrink as part of their Standard of Identity are met and not misbranded.
X Percent (%) Solution	Verify products that contain Percent (%) Added Solution meet regulatory standards and are not misbranded.

Inspection Task Name	Inspection Task Description
MSS; MSP; PDBFT; PDPFT; PDCB; PDCP; AMRS	Verify Mechanically Separated, Partially Defatted, and Advanced Meat Recovery Products meet regulatory requirements.
Batter/Breading	Verify batter and breading of applicable products meets regulatory requirements and product is not misbranded.
Livestock Finished Product Standards	Verify Livestock products are wholesome and not adulterated.
Poultry Finished Product Standards	Verify poultry products are produced in a safe, wholesome manner and not misbranded.
Big 8 Formulation Verification	Product formulation and labeling targeting the eight most common ("Big 8") food allergens.
Labeling - Product Standards	Verify the regulatory or Food Standards and Labeling Policy Book standards of identity.
Child Nutrition/Grade Labeling/Declared Count/Vignette	Verify child nutrition labeling for accuracy and regulatory compliance. Verify accuracy of grade labeling (e.g., choice; prime; select). Verify declared counts when product is sold by the piece. Verify vignette is approved and reasonably reflects product within the package
Labeling - Net Weights	Verify the product meets the net weight regulatory requirements.
Labeling (Scale Calibration) (Import)	Verify scale calibration and acceptability.
General Labeling	Verify all products that bear a label bear all required information and are approved (generically/sketch)
General Labeling (Import)	Monitoring the stamping/marking of US Inspected and Passed cartons, containers, etc.
General Labeling (V)	Duplicate of General labeling (04B04) for voluntary facilities.
General Labeling (Pre-Stamp) (Import)	Monitoring of pre-stamped lots and program
Livestock Humane Handling	Verify that livestock is slaughtered in accordance with regulatory humane handling practice.

Inspection Task Name	Inspection Task Description
Poultry Good Commercial Practices	Verify that poultry is slaughtered in accordance with good commercial practices in a manner that will result in thorough bleeding of the carcasses and ensure breathing has stopped prior to scalding.
Salmonella Verification Sampling	Directed requests to collect Salmonella verification samples.
Microbiological Sampling	Directed collection of microbiological samples
Economic Verification Sampling	Directed sampling for economic wholesomeness issues
Directed Residue Sampling	Task for directed residue sampling for NRP
Export Certification	Verification of information provided on FSIS Form 9060-1, labeling of shipping containers, and export marks.
Export Certification (V)	Document export certification at voluntary facility
Custom Exempt	Verify that custom exempt operations in official establishments meet regulatory requirements and do not impact inspected products or operations.
Retail Exempt	Verify that retail exempt operations do not interfere with inspected products/operations
Other Inspection Requirements	Verify other inspection requirements
Update Establishment Profile	Review and update establishment profile to reflect current establishment operations.
Update Establishment Profile (Import)	Review Establishment Profile and make any needed corrections to reflect current operations. Please refer to FSIS Directive 5300.1 for instructions on the PHIS establishment profile.
Meeting with Establishment Management	Meet with establishment management
Food Defense	Verify establishment policies, procedures, countermeasures to mitigate vulnerabilities to intentional contamination.

Inspection Task Name	Inspection Task Description
Food Defense - (Import)	Verify establishment policies, procedures, countermeasures to mitigate vulnerabilities to intentional contamination.