

TEXAS DEPARTMENT OF STATE HEALTH SERVICES  
MEAT SAFETY ASSURANCE  
Austin, TX

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<h1>MSA PHIS DIRECTIVE</h1>	5220.1 Revision 1	01/21/13
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**GRANTING OR REFUSING INSPECTION; VOLUNTARY SUSPENDING OR WITHDRAWING  
INSPECTION; AND REINSTATING INSPECTION UNDER PHIS**

**I. PURPOSE**

This directive provides instructions to Circuit Managers (CM) and the Grant, Database & Sampling Coordinator (GDSC) about granting an establishment's request to receive inspection services, to have inspection services voluntarily suspended or withdrawn, and to reinstate inspection after voluntary suspension or voluntary withdrawal. This directive also provides instructions for entering data related to these activities into the Public Health Information System (PHIS).

**II. GRANTING INSPECTION AT OFFICIAL MEAT AND POULTRY ESTABLISHMENTS**

A. When an applicant requests a grant of inspection, the Central Office (CO) is to provide the following links which contains the necessary instructions and forms to be completed:

<http://www.dshs.state.tx.us/msa/>

<http://www.dshs.state.tx.us/msa/apps.shtm>

B. The CO can also provide copies of the following:

1. The application for inspection,
2. The Consumer Guide;

C. Upon receipt of an application, the (GDSC) will:

1. Review the application for completeness; and
2. Return to the applicant any application that is not complete and specify the areas of the form that need attention.

D. After the GDSC reviews the application and determines that it is complete and finds no basis for not continuing, the GDSC is to:

1. Assign and forward the application to the appropriate CM;
2. The assigned CM or Assistant State Director's approved designee shall visit and review the applicant's facility.
3. The assigned CM or Assistant State Director's approved designee shall visit, review and return the completed MSA 59-i form back to the CO within 30 calendar days of receiving the application from the GDSC.

- E. In processing the application, the CM is to:
1. Visit the prospective establishment;
  2. Determine whether or not the prospective establishment meets the requirements for receiving a Grant of Inspection
  3. Complete MSA Form 59i
  4. Return the completed MSA Form 59-i and all attachments to the CO within 30 calendar days of receipt from the GDSC.
- F. The GDSC is to review the returned MSA Form 59i and other pertinent information provided by the CM to determine whether the establishment should be granted a grant of inspection.
1. If there may be a basis to refuse to provide inspection and not to grant inspection, the GDSC will forward the denial request to the State Director. Once reviewed by the State Director the GDSC is to write to the applicant informing him or her of that.
  2. If inspection service should be provided to the establishment, the GDSC is to forward the approval request to the State Director for final approval. The applicant must meet all 59i requirements before the State Director can consider granting inspection. Once the State Director grants inspection services, the GDSC is to send the Grant of Inspection and application to the following persons:
    - a) Original to the applicant;
    - b) Copy to the official establishment if the establishment and the applicant have different mailing addresses
    - c) The GDSC is to maintain official file copies of the application, recommendation, grant, and related documents. In addition, the GDSC is to ensure that PHIS is updated to accurately reflect the status of the establishment.
- G. When the CM becomes aware of any significant changes in an establishment or its operations (e.g., new ownership, changed corporate structure, new location, type of operation, or change in operating hours), the CM is to request that the establishment submit an updated application, MSA Form 54, and then have GDSC enter the changes into PHIS.
- H. The GDSC is to maintain the updated application on file and verify that the updates are reflected in the PHIS Establishment Profile.

**NOTE:** An establishment that wishes to alter its approved hours of operation will submit a request to the CM. The CM is to consider the request for change in hours as set out in 9 CFR 307.4 and 381.37.

### **III. OFFICIAL ESTABLISHMENT VOLUNTARY SUSPENSION OR WITHDRAWAL OF INSPECTION**

- A. When the GDSC or CM, receives a written request for a voluntary suspension or voluntary withdrawal of inspection services, he or she is to explain to the establishment the differences between the two.
1. A voluntary withdrawal of inspection is permanent, and establishments wishing to reinstate inspection must reapply for inspection services.

2. A voluntary suspension of inspection services is temporary and normally will not exceed 120 calendar days. An establishment may request such suspensions for purposes of sale, major structural changes, or remodeling. An establishment on voluntary suspension may have a situation arise that is beyond its control (such as inability to obtain equipment on schedule, inability to complete major structural changes because of weather conditions, or other valid reasons). In such a case, the CM, as appropriate to the type of establishment, may extend the 120-day period, if the CO, concurs. The CM or CO may grant establishments that operate on a seasonal basis a suspension of more than 120 days but not for more than a year.
- B. The CM or GDSC is to accept written requests from establishments for a voluntary suspension or voluntary withdrawal of inspection services.
  - C. The GDSC is to issue the voluntary suspension or voluntary withdrawal of inspection form and forward the original to establishment management. The GDSC is to maintain a copy of the form and any related documents.
  - D. The GDSC is to verify that the suspension or withdrawal is properly recorded and documented in PHIS.
  - E. After being contacted by the establishment during the voluntary suspension, the CM or CO is to notify the GDSC that the establishment has requested that inspection be reinstated.
    1. Before inspection is reinstated, the CM is to visit the establishment to determine whether its facilities and equipment warrant the reinstatement and document the results on MSA Form 59j “.
    2. In cases where the establishment warrants reinstatement of inspection, the CM is to recommend reinstatement of inspection service to the GDSC. In cases in which the establishment does not warrant reinstatement of inspection, the CM is to not recommend reinstatement of inspection services to the GDSC.
  - F. The GDSC is to ensure that the data in PHIS is updated to reflect the establishment’s status.

#### **IV. REFUSAL OR WITHDRAWAL OF INSPECTION SERVICE**

The CM is to notify the CO or GDSC when there is reason to believe inspection services should be refused or withdrawn (other than voluntary withdrawal) from an applicant or recipient of inspection service.

#### **V. QUESTIONS**

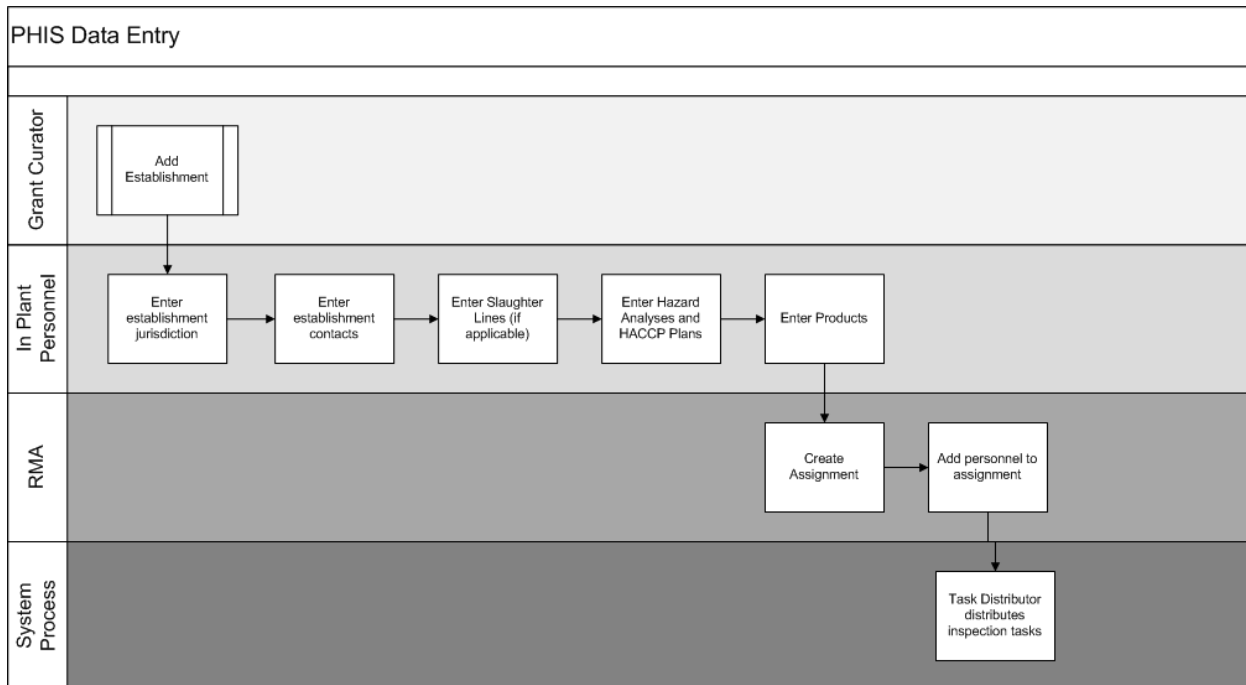
Questions regarding this Directive shall be directed to the MSA Central Office through the supervisory chain-of-command.

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# Attachment 1: PHIS Data Entry Instructions for Existing and New Establishments

## A. Overview

The following flow chart describes the basic process for setting up an establishment and assignment in PHIS so inspectors can begin scheduling tasks and entering inspection results.



## B. Users

In order to completely set up an establishment and its profile, several user roles are required. Table 1 lists the role and the process that role can complete.

Table 1: Roles and Processes

Role	Process
Grant Curator (Domestic & Import)	Add Establishment
Consumer Safety Inspector Frontline Supervisor Public Health Veterinarian DM/DDM	Enter Establishment Profile
RMA (Domestic-OFO) or RMPS (HQ) DM/DDM	Create and Edit Assignments

## C. Before You Begin

Before you start entering data for existing establishments into PHIS, you should gather as much information as possible about the establishment.

Where applicable, the source of the information is noted in parentheses after the step. In some cases, specific block numbers are given, such as (Source: Block #3 Application for Inspection (AFI)). Note that those numbers are derived from the most recent version of the form. If you are working with older forms, please be aware the numbering may have changed.

## 1. **What You Need**

The following information is necessary:

- Original/Copy if the application for federal inspection
- Original/Copy of the grant of inspection
- Assignment list with personnel
- Access to the PBIS detailed profile
- Contact information for the following:
  - All contacts in PBIS
  - The FSIS Inspection Office Mailing Address
  - The Lab Sample Supplies Address
- Access to in-plant personnel who can relay information about the establishment's HACCP Plans, Hazard Analyses, Products, and Slaughter Lines

## 2. **Access PHIS**

PHIS is a Web-based application that you access through a Web browser, such as Internet Explorer. Your computer must be connected to the FSIS network for this task.

### a. **To access PHIS:**

1. Open a Web browser and navigate to <https://phis.fsis.usda.gov>, or click Start > FSIS Applications > Inspection Assignments > PHIS > USDA FSIS PHIS Online.
2. Enter your eAuthentication user name and password.
3. Click Login.  
The PHIS Dashboard opens.

## D. **Add Establishment**

To add a new establishment to PHIS, you will need the information contained in the Application for Federal Inspection (AFI). A user with the Grant Curator (Domestic & Import) user role starts the process of adding an establishment to PHIS. Also, please confirm with the SRMA that the appropriate circuit has been created in PHIS before you get started.

**Tip:** Be sure to save your work periodically so you do not lose any data you have entered.

### a. **To add an establishment:**

These instructions explain how to add a meat or poultry grant. For voluntary reimbursable services agreements, see the next section titled "To add a voluntary reimbursable service agreement."

1. Log in as a Grant Curator.
2. Click Establishment Profile > Add Establishment.
3. Click Add new Grant. The Application for Federal Inspection (AFI) page opens.
4. For the Date field, enter today's date.
5. For the PBIS Establishment ID field, enter the establishment ID from PBIS Reader or other legacy system.

**NOTE:** Once you save this record, **you can no longer edit the PBIS Establishment ID field. Please verify the number is correct before clicking Save.** This number typically contains no more than 4 digits and does not contain any letters. (Source: PBIS Profile)

**NOTE:** Egg and Import establishments are not in PHIS as of summer 2011.

6. Select the Type of Inspection Required: Meat or Poultry. (Source: Block #3 AFI)
 

**NOTE:** The page refreshes after each time you select a Type of Inspection. Please allow time for the page to refresh after each check; otherwise, you may have to redo some data entry. It is OK to select both check boxes, you just need to pause between each selection. If you do have both types selected, a separate meat section and a separate poultry section are made available for data entry further down on the page.
7. Select the Form of Organization. (Source: Block #5 AFI)
 

**NOTE:** By default, Individual is selected. If you select a different option, the page refreshes and additional fields may become available. For example, if you select Corporation, the page refreshes and fields for Corporate Information appear on the page.
8. Complete the required fields in the Applicant (Owner) section. (Source: Blocks #8 and #9 AFI)
  - a. Name
  - b. Telephone
  - c. Mailing Address
9. Complete the required fields in the Plant section. (Source: Blocks #10a and #11 AFI)
  - a. Name
  - b. Telephone
  - c. Physical Location
  - d. Mailing Address
 

**NOTE:** If the Phone Number, Physical Location, or Mailing Address is the same as the applicant's, you can select the appropriate check boxes to copy the information.

Phone Number Same as Applicant's Phone Number

Physical Location Same as Applicant's Mailing Address

Mailing Address Same as Applicant's
  - e. Enter information in the Co-located Official Establishments block if you have co-located establishment information. (Source: Block #17 AFI)
  - f. Enter information in the Doing Business As block if you have doing-business-as information. (Source: Block #13 AFI)
  - g. The Ready to Operate date is not required for existing establishments, but if you have the historical information, you can enter it.

10. Select the Animals to be Slaughtered and/or Types of Products in the Meat Inspection and/or Poultry Inspection sections. Be sure to select all applicable check boxes. This information is critical to the proper assignment of tasks to this establishment. (Source: Blocks #18 and #19 AFI)  
**NOTE:** For slaughter establishments, you must select at least one of the check boxes in the Animals to be Slaughtered section.

11. In the Ownership and Management Information section, enter the required fields.  
 a. Person Signing Application (This is the non-FSIS person who signed application)  
 (Source: Block #27 AFI)

12. In the FSIS Information section, enter the required fields:

- a. Establishment Number
  - i. Click Add new Establishment Number. (Source: Block #2 Grant of Inspection (GOI)).
  - ii. Select the Type of Inspection. The available values are based on what you chose in step 5. (Source: Block #7 GOI)  
 For Ownership Number, PHIS defaults to the next available number. As you are entering a grant for an existing establishment, delete the default value and type the already assigned establishment number. Enter numerals only.  
**NOTE:** There is a change in the format of establishment numbers in PHIS. Where in PBIS a number could be 00038A M, in PHIS it would be M38A. The M is the “type” (meat); the 38 is the “ownership number;” and the A is the “suffix.”
  - iii. Enter a suffix in the Suffix field if applicable. After you click the Suffix field, a preview of what the establishment number will look like appears below the suffix data-entry field.

The screenshot shows a software interface for entering establishment information. At the top is a grey header 'FSIS Information'. Below it is a section titled 'Establishment Number\*'. This section contains a blue button with a folder icon and the text 'Add new Establishment Number'. Below the button is a table with two columns: 'Type of Inspection' and 'Establishment Number'. Underneath the table is a grey header 'Add New Establishment Number'. This header is followed by three input fields: 'Type of Inspection\*' with a dropdown menu showing 'Meat', 'Ownership Number\*' with a text box containing '38', and 'Suffix:' with a text box containing 'A'. Below these fields, the text 'Establishment Number: M38A' is displayed. At the bottom right of the dialog are two buttons: 'Save' and 'Cancel'.

- iv. Click Save.
- v. Repeat this process for each Type of Inspection.
- b. Approver’s Name, typically the District Manager or the approver on the application  
 (Source: Block #35 AFI)
- c. Date Approved (Source: Block #36 AFI)

13. In the Circuit section, select the Area from the drop-down list. (For example, “65 - Albany, NY” and “35 – Syracuse” as the Circuit.)

14. Click Finish. The grants are listed on the Grant/Voluntary Reimbursable Service page with a Status of “Reserved.”
15. Click Reserved to change the status of each grant.
16. From the New Status field, select “Recommended” for each grant.
17. Click Recommended. You can continue to update the grant until you reach the “Granted” status, or you can begin entering the establishment profile information, which is covered in the next section titled “Enter Establishment Profile.”
18. From the New Status field, select “Conditional.”
19. Enter the required fields:
  - a. Inauguration Date (Source: Block #8 GOI)  
**NOTE:** Once you save this record, you can no longer edit the Inauguration Date field. Please verify the date is correct before clicking Save.
  - b. Approved Hours of Operation (Sources: PBIS Profile or Hours of Operation form)  
**NOTE:** Use the PBIS profile for the most up-to-date hours of operation.
    - i. Click Add new Inspection Hour
    - ii. Select the Shift.
    - iii. Select the days the establishment operates.
    - iv. Enter the Start time and End time.
    - v. Click Save.
    - vi. Repeat this process for each shift.
  - c. Select Yes for “Applicant qualified by OPEER?”
  - d. Click Save.
  - e. Repeat steps a-d for each type of inspection.
20. Click “Conditional.”
21. From the New Status field, select “Granted.”
22. Select Yes for “Has the establishment validated its HACCP Plans?”
23. Click Save.
24. Repeat steps 20 – 23 for each grant.

**b. To add a voluntary reimbursable services agreement:**

These instructions explain how to add voluntary reimbursable services agreements. If you have already entered a meat or poultry grant, much of the information in the voluntary reimbursable services agreement will be pre-populated.

1. Log in to PHIS as a Grant Curator.
2. For new establishments, click Establishment Profile > Add Establishment. For existing establishments, click Select Establishment, search for the establishment, and select it.
3. Click Grants and Approvals.
4. On the Grants/Voluntary Reimbursable Service page, click Add New Voluntary Reimbursable Agreement.
5. In the Date field on the Application for Voluntary Services (AVS) page, type today’s date. (MM/DD/YYYY)
6. For the Type of Inspection Required, select New.
7. Select the Form of Organization.



**NOTE:** By default, Individual is selected. If you select a different option, the page refreshes and additional fields may become available. For example, if you select Corporation, the page refreshes and fields for Corporate Information appear on the page.

8. Complete the required fields in the Applicant (Owner) section. (Source: Blocks #4 through #8 AVS)
  - a. Name
  - b. Telephone
  - c. Mailing Address
9. Complete the required fields in the Plant section. (Source: Block #9 AVS)
  - a. Name
  - b. Telephone
  - c. Physical Location
  - d. Mailing Address


**NOTE:** If the Phone Number, Physical Location, or Mailing Address is the same as the applicant's, you can select the appropriate check boxes to copy the information.
10. In the Services Requested block, select the appropriate services or voluntary slaughter information. (Source: Block #15 AVS)
11. Enter the required fields in the Ownership and Management Information section. (Source: Blocks #18 through #20 AVS)
  - a. Person Signing Application (This is the non-FSIS person who signed application)
12. In the FSIS Information section, enter the required fields:
  - a. Establishment Number
    - i. Click Add new Establishment Number.
    - ii. For Ownership Number, if a meat or poultry grant already exists, PHIS defaults to already assigned number; otherwise, PHIS displays the next available number. If you are entering information for an existing plant that has a meat or poultry grant, accept the already assigned number. If you are entering information for an existing plant that does not have a meat or poultry grant, but already has an establishment number, overwrite the next available number value so that it matches the current establishment number.
    - i. Enter a suffix in the Suffix field if applicable. After you click the Suffix field, a preview of what the establishment number will look like appears below the suffix data-entry field.
    - iii. Click Save.
  - b. Approver's Name, typically the District Manager or the approver on the application (Source: Block #25 AVS)
  - c. Date Approved (Source: Block #26 AVS)
13. In the Circuit section, select the Area and Circuit from the drop-down lists. (For example, "65 - Albany, NY" and "35 - Syracuse" as the Circuit.)
14. Click Finish. The voluntary approval is listed on the Grant/Voluntary Reimbursable Service page with a Status of "Reserved."
15. Repeat steps 3-15 for each additional voluntary approval you need to enter.
16. Click Reserved to change the status of the voluntary approval.
17. For the New Status field, select "Recommended" for the voluntary approval.
18. Click Save.

19. On the Grant/Voluntary Reimbursable Service page, click Recommended.
20. For the New Status field, select “Granted” for the voluntary approval.
21. Click Save.
22. On the Grant/Voluntary Reimbursable Service page, select the operating status from the drop-down list.
23. Verify that the status is Active.
24. Click Save.
25. Repeat steps 16-24 to modify the status for each voluntary approval.

### E. Enter Establishment Profile

This section explains how to enter information for Contacts, Slaughter, HACCP, and Products. Review the information provided in FSIS Directive 5300.1 on Managing the Establishment Profile in the PHIS. A user with one of the following roles is required for Establishment Profile data entry: Consumer Safety Inspector or Frontline Supervisor.

1. Log in as a Consumer Safety Inspector.
2. Click Establishment Profile > Select Establishment.
3. Enter the establishment number in the Number field and click Search.  
**NOTE:** The Number field only accepts numerals. Do not enter M, P, or any suffixes.
4. Click the house icon to select the establishment.

	Name	Number	Circuit	City	State
	<a href="#">Dudley Poultry Co., Inc</a>	M1392 + P1392	35 -	Middlesex	New York

5. Click Contacts.
6. Click Add New Contacts.
7. Select the Position first, and then click the applicable types:  
**NOTE:** If the establishment receives lab sample results via email, be sure to enter the FSIS Lab Sample Result Contact and include an email address.
8. Click Save.
9. Repeat Steps 6 – 8 for each position.
10. Click General.
11. On the Establishment tab, click Add New Address.
12. Enter the address information:
  - i. At a minimum, enter the following address types: FSIS Inspection Office Mailing Address, Overnight Mailing Address (in PBIS this is the “Overnight FedEx Address”), and the Laboratory Sample Supplies Address.  
**Tip:** You can select more than one type by holding down the Ctrl key and selecting the Address Type. This will create multiple records with the same address.
  - ii. Address Line 1 and Address Line 2 (if applicable)
  - iii. City
  - iv. State
  - v. Postal Code
13. Click Save.
14. Click the Jurisdictions tab.
15. Select the appropriate jurisdiction.

**NOTE:**

Do not select State, as this option is not currently supported in PHIS.  
 For Cross Utilization plants, select FSIS Inspection Only.

16. Click Save.
17. Click the Other tab.
18. Select the HACCP Establishment Size.
19. Enter the Latitude and Longitude for the establishment if you have the information.
20. Click Save.

**1. Add Hazard Analyses and HACCP Plans**

In order for you to be able to add Product Groups, which are necessary for certain tasks to be distributed, you must first enter Hazard Analyses and HACCP plans. When you add a Hazard Analysis, you identify the HACCP Processing Categories necessary for Product Groups. For more information review FSIS Directive 5300.1.

There are two sections on the HACCP Processing page: Summary, which lists the HACCP Processing Categories specific to the establishment and the Hazard Analyses. The Summary section is updated whenever you add a new Hazard Analysis. You must enter a Hazard Analysis before entering a HACCP Plan.


HACCP Plans are associated with a specific Hazard Analysis. You may need to contact IPP in order to complete this information.



**a. To add a Hazard Analysis:**

1. Log on to PHIS.
2. Click Establishment Profile > Select Establishment.
3. Search for and select the establishment.
4. Click HACCP.
5. Click Add New Hazard Analysis.
6. Enter the required information.
  - a. Document Name
  - b. Date
  - c. HACCP Processing Category
  - d. Lot Definitions
7. Click Save.  
 A message appears that the analysis has been added successfully.
8. Repeat steps 1 – 7 for each hazard analysis you want to add.

**b. To add a HACCP Plan to a Hazard Analysis:**

After adding a hazard analysis, you can create HACCP plans. You may need to contact IPP in order to complete this information.

1. Log on to PHIS.
2. Click Establishment Profile > Select Establishment.
3. Search for and select the establishment.
4. Click the triangle  to the left of the Hazard Analysis that you are adding a HACCP plan to.

Hazard Analyses		Date	Edit	Delete
▼	RAW PRODUCT - GROUND	6/7/2011		
HACCP Plan		Date	Edit	Delete
<a href="#">Add HACCP Plan</a>				

5. Click Add HACCP Plan.
6. Enter the required information:
  - a. Plan Name
  - b. Signature Date
  - c. HACCP Processing Category

**NOTE:** The Hazard Analysis field is pre-filled for you.
7. Click Save.
8. Repeat steps 5 – 7 to add additional HACCP Plans to the selected analysis.

## 2. Enter Products

Product Groups must be added in PHIS before tasks can be distributed. Data on the HACCP Processing page is needed in order to add a new product group.

For consistency in entering products and product volume review the information FSIS Directive 5300.1.

### a. To enter products:

1. Click Establishment Profile > Products.
2. Click Add new Product Group.  
Depending on the HACCP Processing Categories identified previously, you will see one or more tabs on the Add new Product Group page.
3. For each tab, complete the required fields. After selecting the Finished Product Category, select each Product Group that applies and then choose a volume from the Average Daily Volume pounds per day fields.

**NOTE:** If the volume data is not known, select the highest volume range.

Product Group*	Average Daily Volume pounds per day
<input checked="" type="checkbox"/> Further processed poultry parts (Boneless and/or Skinless Parts)	3,001 - 6,000
<input checked="" type="checkbox"/> Poultry parts (including necks/feet & giblets)	3,001 - 6,000
<input checked="" type="checkbox"/> Whole Bird	3,001 - 6,000

4. Select the species.
5. Enter the Intended Use  
**NOTE:** If you select Other, enter the other Intended Use in the space provided.
6. Click Save.
7. Repeat this process for each product.
8. Click the Volumes tab and select a value for each HACCP Processing Category.

Products	Volumes
<b>HACCP Volumes</b>	
Raw - Intact	Select
Raw - Non Intact	1 - 1,000
Slaughter	Select
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

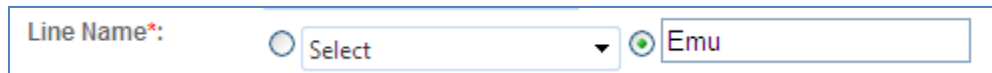
9. Click Save.

### 3. Add Slaughter Lines

If the establishment is a slaughter establishment, click Slaughter to enter slaughter lines. Slaughter lines should be entered after you have entered HACCP and Product information. A slaughter line should be entered for each shift that slaughters; you cannot create one slaughter line that covers multiple shifts. Shifts can, however, have multiple slaughter lines. For additional Slaughter information review FSIS Directive 5300.1.

1. Click Add new Line.
2. Enter the required fields:
  - a. Shift
  - b. Inspection Type
  - c. Line Name

If a slaughter line has not already been entered the drop-down list will be empty. In this case, click the circle to the left of the second box and enter a slaughter line name. In the image below “Emu” appears in the second box as an example.

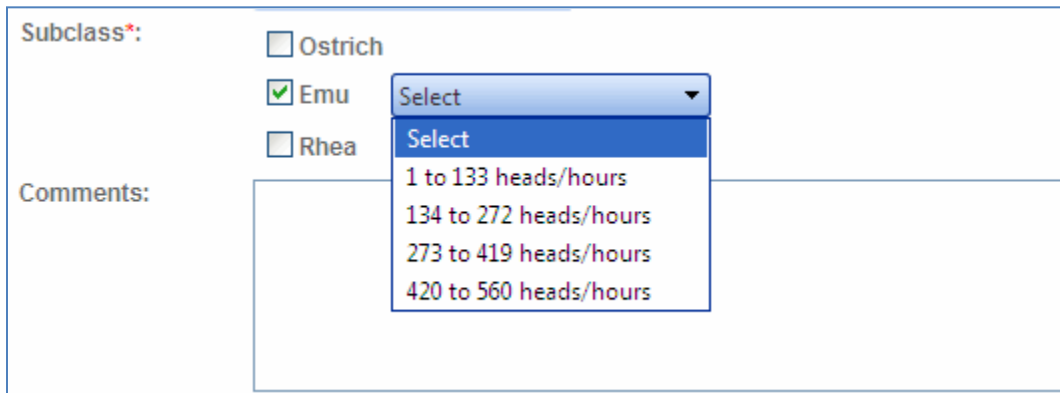


- d. Class
- e. Slaughter System
- f. Inspection System

After entering data for items a through f, the page refreshes and subclass options are available.

3. Subclass

After selecting a subclass, the page refreshes and you can select the number of heads/hours for each subclass.



4. Click Save.
5. Repeat steps 1-4 for each slaughter line.

## F. Create Assignments





Now that the establishment has been updated with core data, it must be placed into an inspection assignment. This task must be completed by a user with the RMA or RMPS user role. To perform this task, you will need the RIS Assignment Sheet and RIS Position Listing.

Assignments should be created by supervisory order. For example, create a Supervisory Consumer Inspector assignment prior to creating any subordinate in-plant assignments, such as a GS-7.

**NOTE:** If you search for a person and cannot find him or her in the resulting list, it is possible that the record is not flagged appropriately. To flag a personnel record: Login as an RMA and click Resource Management > Personnel. On the Personnel page use the Filter Personnel Resources block to search for the record. Select the record and verify that the IsField check box is selected. Click Save.

**a. To create assignments:**

1. Log in as an RMA.
2. Click Resource Management > Circuit.
3. Select your circuit from the list.
4. On the IPS tab, click Add new Circuit IPS.
5. Enter the required information:
  - a. Number
  - b. Type
6. Click Save.
7. Click Return to Previous Page.
8. From the left menu, click Assignments.
9. To select the IPS you just created, complete the District, Circuit, and IPS fields.
10. Click Add New Assignment.
11. At this point, you cannot select the Headquarter Plant, so leave the HQ Point and the HQ Point Shift fields blank.
12. Verify or enter the required information:
  - a. Number
  - b. Number of Positions
  - c. Slaughter – On Line
  - d. Role
  - e. Frequency
  - f. Coverage
  - g. Standard Job
  - h. External Travel % (This can be found on the Position Listing)
  - i. Supervising Asgn
13. Click Save.
14. Click Assign Personnel Resources and Establishments (the green arrow).

Add new Assignment							
	Assignment	Grade	Duty Station	No of Positions	Export	Edit	Remove
	6535-04-01	4		9			

15. On the Assign Establishment tab, click the Search Establishments bar to expose the establishment search fields. By default, you will see a list of all the establishments in that circuit (separated by shift).
16. Click Assign next to each establishment you want to add to the assignment.
17. On the Staffing Requirements tab, enter the External Travel amount, if necessary, and click Update.

18. If you have another establishment, repeat steps 14-17; otherwise, go to the next step.
19. Click the Assign Personnel Resources tab.
20. Click the Search Personnel Resources bar to expose the personnel search fields.
21. Search for personnel to assign.  
**NOTE:** If the person is not showing up here, go to the personnel section and verify that the box "Is field" is checked on his/her profile.
22. Click Assign if the user is permanently in this assignment. Click Coverage if the user does temporary coverage.  
**NOTE:** Users can only be in one permanent assignment.
23. If this is a permanent assignment and if the user is the IIC, go to the next step; otherwise, go to Step 27.
24. Click the edit pencil under Assign as IIC.  
Additional fields appear.
25. Select the Is IIC check box and the establishment for which the user is the IIC.
26. Click Save.
27. Click Return to Previous Page.
28. On the Assignment page, click the edit pencil for the new assignment record.
29. In the General Information block, to the right of the HQ Point field, click Search.
30. On the Search Establishments window, a list of all the establishments associated with the new assignment appears. Select the appropriate check box for the Headquarter Plant.
31. Click Select.
32. On the Assignment page, click Save.

#### **G. Verify Completeness**

After you have completed the data entry for an establishment, verify that the record contains all of the following information:

- One or more grants with inspection activities for each grant (requires grant curator to check the appropriate boxes under "animals to be slaughtered" or "types of products" on Grant page)
- Establishment Jurisdiction
- Days and Hours of Operation

Depending on the type of establishment verify that the record contains some or all of the following information:

- Hazard Analyses (including name, date, and HACCP category)
- HACCP Plan (including the name, date, HACCP category, and associated hazard analysis)
- Product Volumes
- HACCP Category Production Volumes