PROCESS OVERVIEW

Purpose

The purpose of this transaction is for Recall Specialists to display a recall for review purposes. Through this transaction, you can perform a search for a recall, and then display general data as it relates to the specific recall. You will be able to see any case notes on the recall, and information on the partners, activities, documents, products, and transactions linked to the recall.

Process Trigger

Perform this transaction when you need to review a recall that has been created.

Prerequisites

- Recall case must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Recall Administration** tab ➔ **Create/Display Recall** link to go to the *Search Cases* screen.

Tips and Tricks

- This transaction will not allow you to modify any fields.
- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - A **Conditional field**: an entry that becomes required as a result of entering something previous to it, which then deems it required.
  - An **Optional field:** you may enter information in an optional field, but an entry is not required for the completion of the transaction.
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

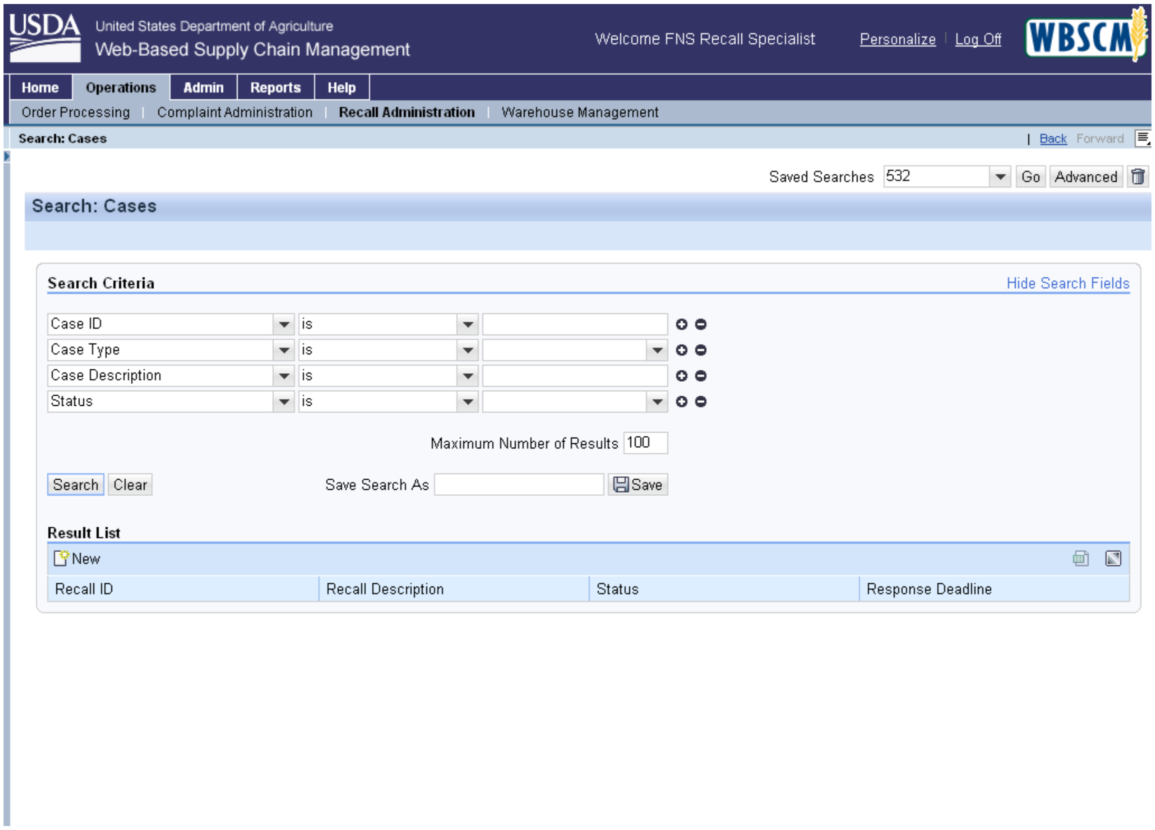
Reminders

- Remember to check your work.
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.

PROCEDURE

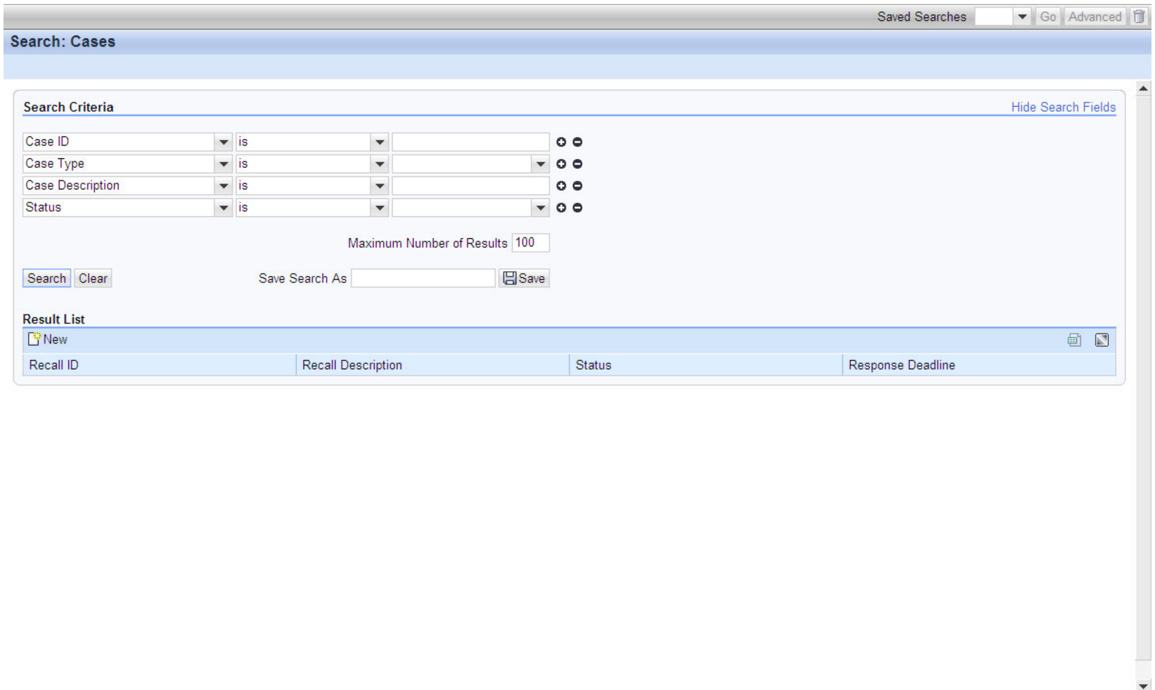
1. Start the transaction using the Portal path: **Operations** tab ➔ **Recall Administration** tab ➔ **Create/Display Recall**

Search: Cases Screen



2. Click the **Case ID** field.

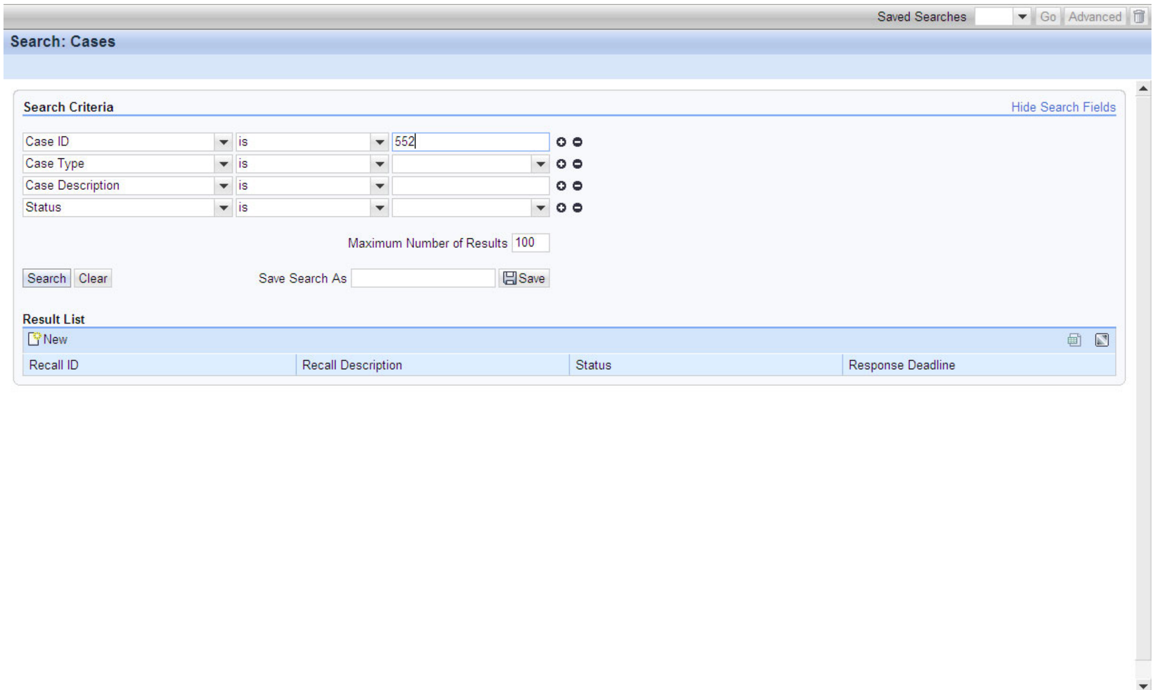
Search: Cases Screen



3. As required, complete/review the following fields:

Field	R/O/C	Description
Case ID	O	A unique identifying number associated with the recall case. **Example:** 552

Search: Cases Screen

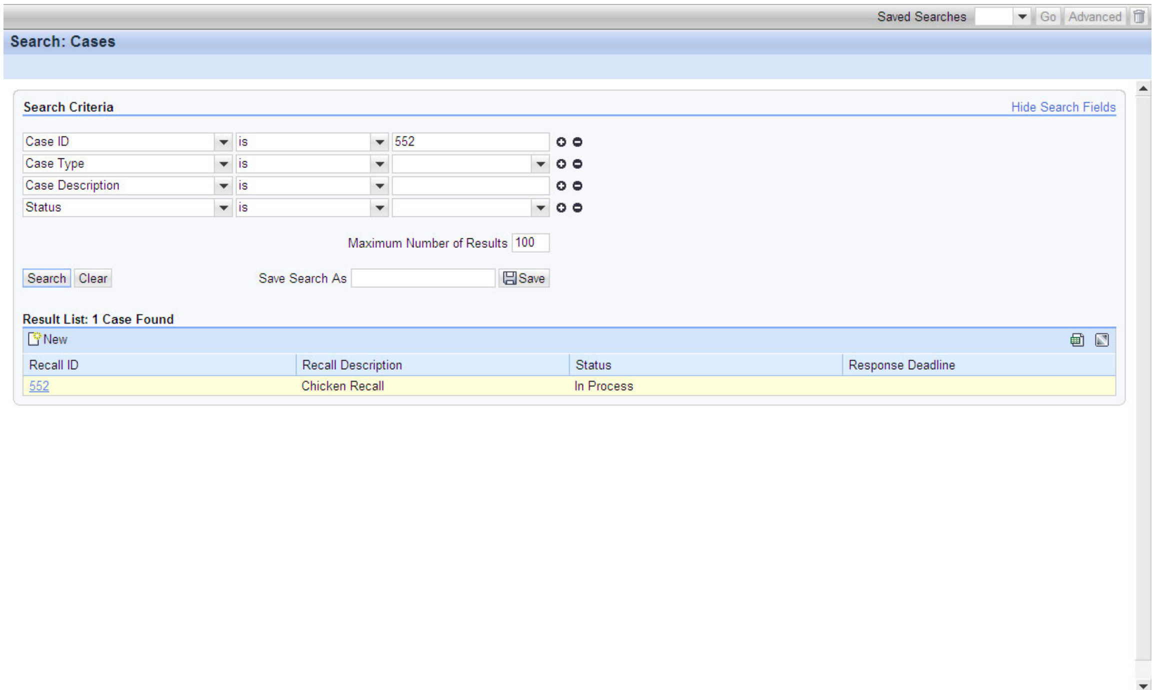


4. Click Search (the **Search** button) to process your entry.

(Note) To narrow your search results, enter appropriate criteria. You can search by Case ID, Case Type, Case Description, or Status.

When searching for a recall, you can also use the following search method located in the second drop down box: *is, is not, contains,* and *starts with*. The search criteria has to match exactly when using *is.* When you are looking for a recall that does not have a certain search criteria, then you would use *is not*. When using *contains*, the output that will be listed will include the word entered in the search criteria. Whatever was entered in the search criteria when using *starts with*, will have the search output beginning with what was entered.

Search: Cases Screen

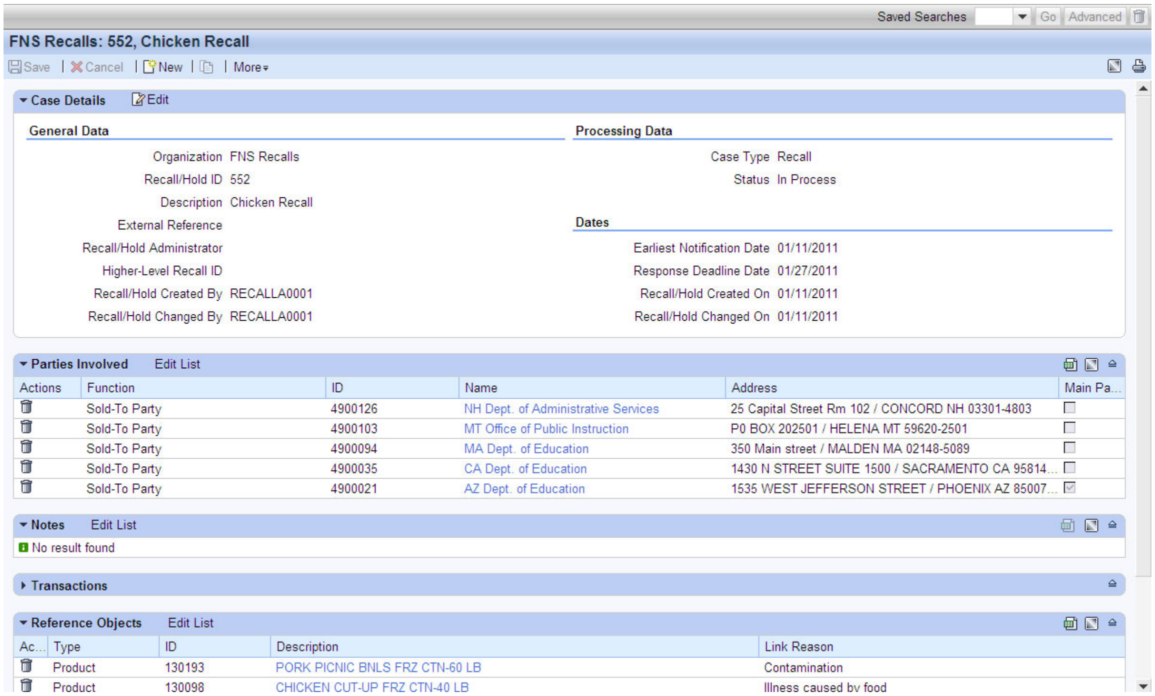


5. Click 552 (the **552** link) to display the recall information. This number represents the Recall Case ID.

(Note) This screen displays a list of recalls (or in this example, one recall). Since we entered the exact Case ID number, we only received one search result.

The results table contains information such as the Recall ID, Recall Description, Status, and Response Deadline.

FNS Recalls: 552, Chicken Recall Screen

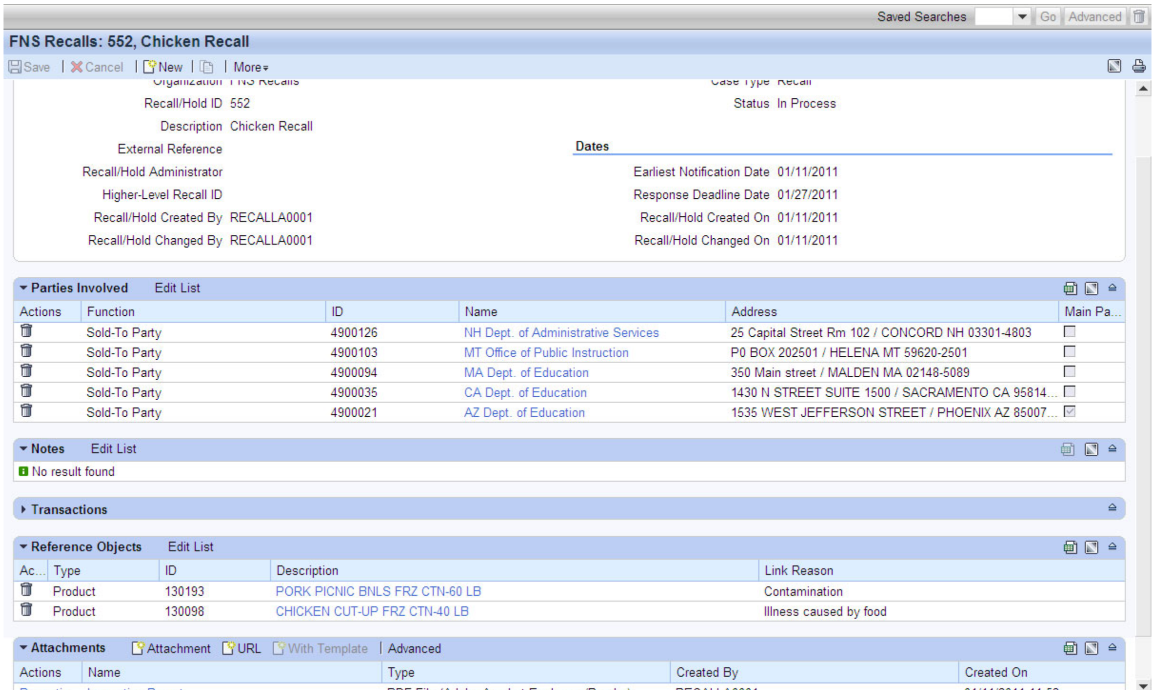


6. The recall case displays. Scroll down to display more.

(Note) This screen shows the case details for the recall. The upper left side of the screen shows General Data such as type of recall, recall ID, description, who the recall was created by, and who the recall was last changed by. On the upper right side of the screen is the processing data such as the status, earliest notification date, response deadline date, recall creation date, and the date the recall was last changed on.

Below the case details is a list of Parties Involved. *Parties Involved* are the sold-to parties, their names, ID's and contact information.

FNS Recalls: 552, Chicken Recall Screen



7. You have completed this transaction.

(Note) Displayed below the case details are the parties involved, notes, transactions, reference objects, and attachments related to the recall.

The *Notes* section contains notes on the investigation, complaints filed, and reasons for the recall investigation. *Transactions* are the complaints, sales orders, and entitlement increments and decrements related to the recall. *Reference Objects* show the products affected by the recall. *Attachments* is documentation related to the recall.

RESULT

You have successfully viewed a recall.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for SDA/ITO Recall Specialists to fill out and submit the Recall Survey Response Form on behalf of their RAs and Ship-Tos. This form is generated in WBSCM to account for all inventory that is being recalled. This procedure describes the steps to access and submit findings for a recall. SDA/ITOs should communicate all recall information with their RAs and Ship-Tos.

Process Trigger

Use this transaction to display, complete, modify, or submit a response form on behalf of the organization and suborganizations in WBSCM.

Prerequisites

- Recall case must exist in WBSCM.
- Current date must be before the response deadline.
- SDA/ITO accessing the form must be assigned to the recall case.
- Recall Specialists and Recall Contacts have at least 2 Recall Communication Methods set up in their User Profile.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Recall Administration** folder ➔ **Access Recall Survey Response Form** link to go to the *Access Recall Survey Response Form* screen.

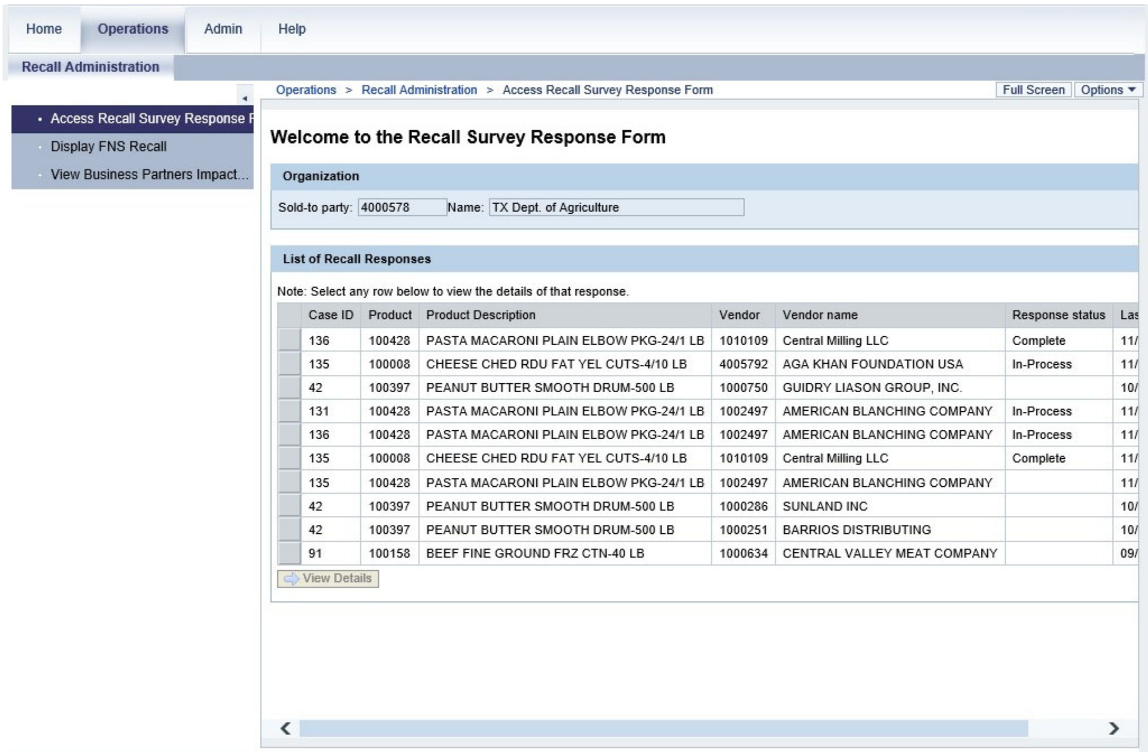
Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction.
  - **Optional (O)** – a non-mandatory field not required to complete the transaction.
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field.
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

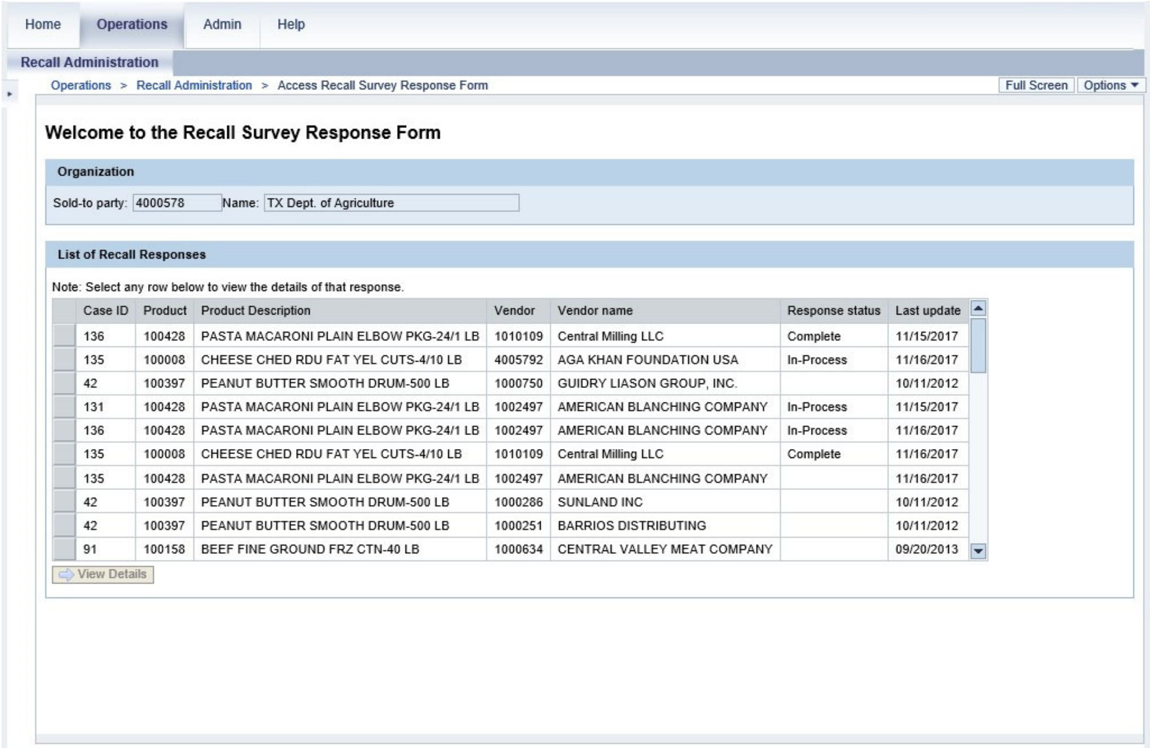
1. Start the transaction using the following Portal path: **Operations** tab ➔**Recall Administration** folder ➔ **Access Recall Survey Response Form** link.

Image: Access Recall Survey Response Screen



2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Access Recall Survey Response Screen



3. SDA/ITO Recall Specialists use the *Access Recall Survey Response Form* screen to select recall response forms assigned to their organization by an FNS Recall Specialist.Click (the Vertical **scrollbar**) to display additional cases as necessary.

(Note) To ensure the recall is properly communicated, Recall Specialists and Recall Contacts must have at least 2 Recall Communication Methods set up in their User Profiles. Recall Communication Methods may only be set up by the Recall Specialist or Recall Contact on their own profile. For more information on how to configure Recall Communication Methods, refer to the **Maintain User Profile** work instruction.

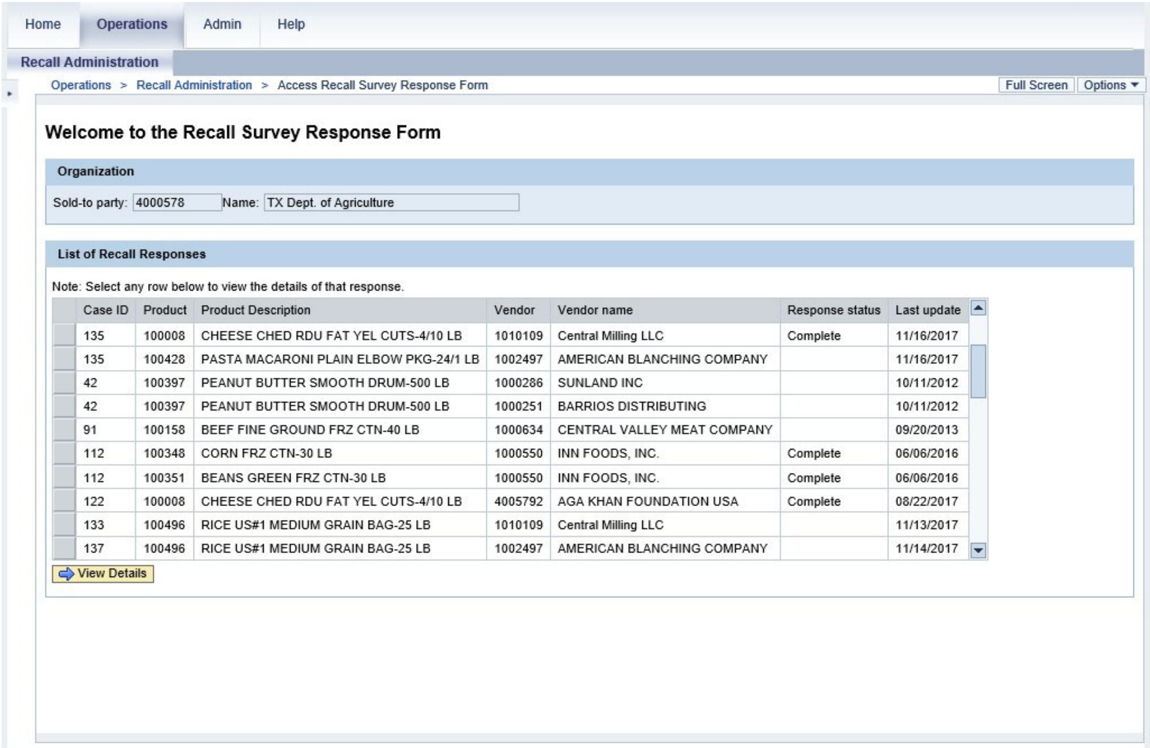
(Note) In the *List of Recall Responses* section, **Response Status** refers to the status of the response form, which may be one of the following:

- **Open (or blank)** - Forms that have not been started.
- **In-Process** - Forms that have been saved but not yet submitted by a Recall Specialist. These forms can be accessed and modified by the assigned Recall Specialist at any time. Forms in this stage have not been submitted to the USDA.
- **Completed** - Forms that have been saved and submitted to the USDA, and can be modified only by an FNS Recall Specialist.

4. As required, complete/review the following fields:

Field	R/O/C	Description
Case ID	R	A unique identifying number associated with the Hold or Recall case. **Example:** 91
Product	R	Substance or commodity that is bought or sold on a commercial basis, or is used, consumed, or created in production; a product can also be a service. Also, a number identifying a material master record. **Example:** 100158
Product Description	R	Information used to characterize a material. **Example:** CVM Recall -Ground Beef -100158 4/10 lb Chubs
Vendor	R	Business partner that provides materials or services. **Example:** 1000634
Vendor name	R	Business partner that provides materials or services. **Example:** CENTRAL VALLEY MEAT COMPANY
Response status	R	Status of the Recall Survey Response form.
Last update	R	Most recent date for update. **Example:** 09/20/2016

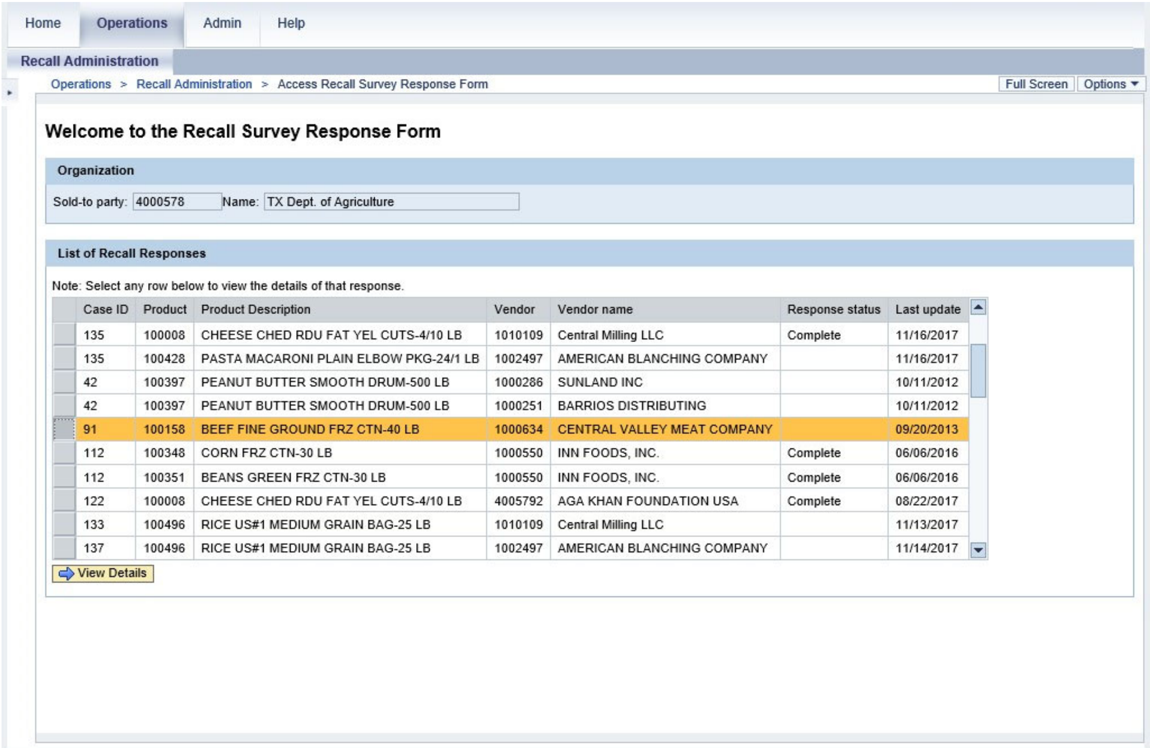
Image: Access Recall Survey Response Screen



5. Click (the **Selection** box) next to **Case ID** "91" to display the *Access Recall Survey Response Form*.

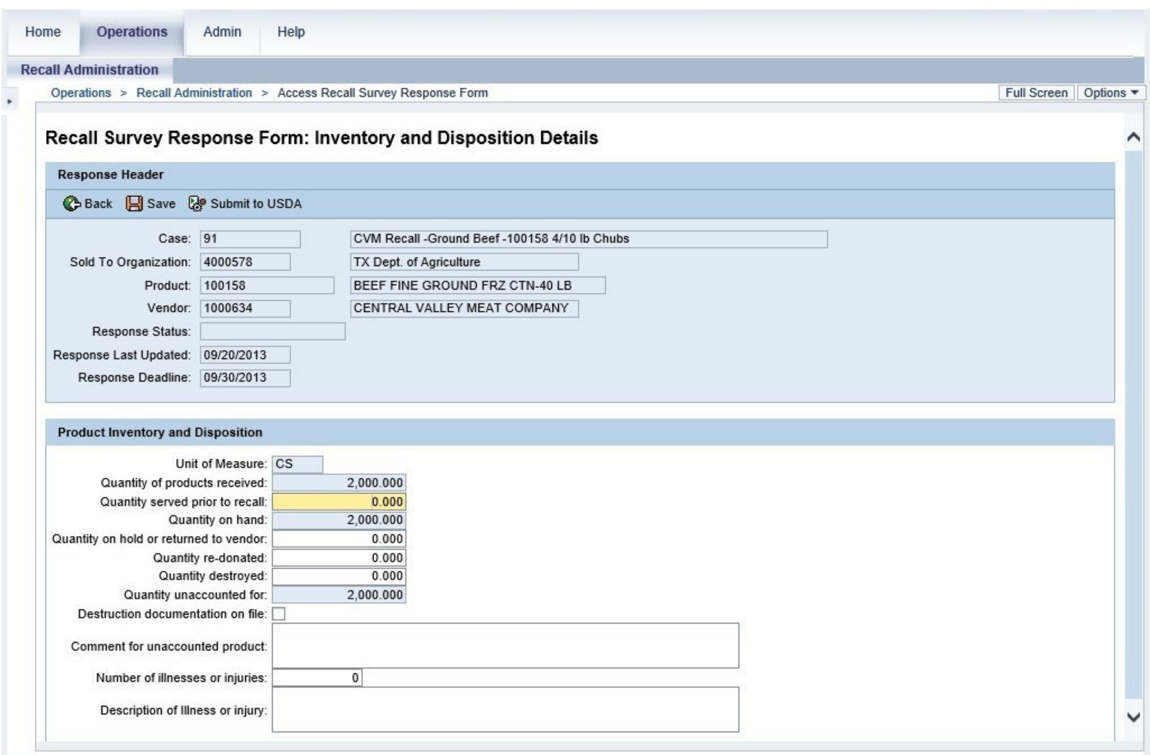
(Note) The *Response Header* section identifies the product, vendor, and other details about the recall. The Recall Specialist enters disposition quantities for the recalled product and related information in the *Product Inventory / Disposition* section.

Image: Access Recall Survey Response Form Screen



6. Click **View Details** (the **View Details** button).

Image: USDA Recall Response



7. As required, complete/review the following fields:

Field	R/O/C	Description
Product	R	Substance or commodity that is bought or sold on a commercial basis, or is used, consumed, or created in production; a product can also be a service. Also, a number identifying a material master record. **Example:** 100158
Product Description	R	Information used to characterize a material. **Example:** CVM Recall-Ground Beef - 100158 4/10 lb Chubs
Response Status:	R	Status of the Recall Survey Response form.
Response Deadline:	R	Designated deadline for SDA to provide a completed Recall Survey Response form. **Example:** 09/30/2013
Unit Of Measure:	R	Unit by which quantities are to be measured. **Example:** CS
Quantity of products received:	R	Number of items received by RA/Ship-to. **Example:** 2,000.00
Quantity served prior to recall:	O	Quantity of product that was served prior to the recall being issued. **Example:** 100
Quantity on hand:	R	Quantity of product that is currently on hand based on the most recent inventory count. **Example:** 2,000.00

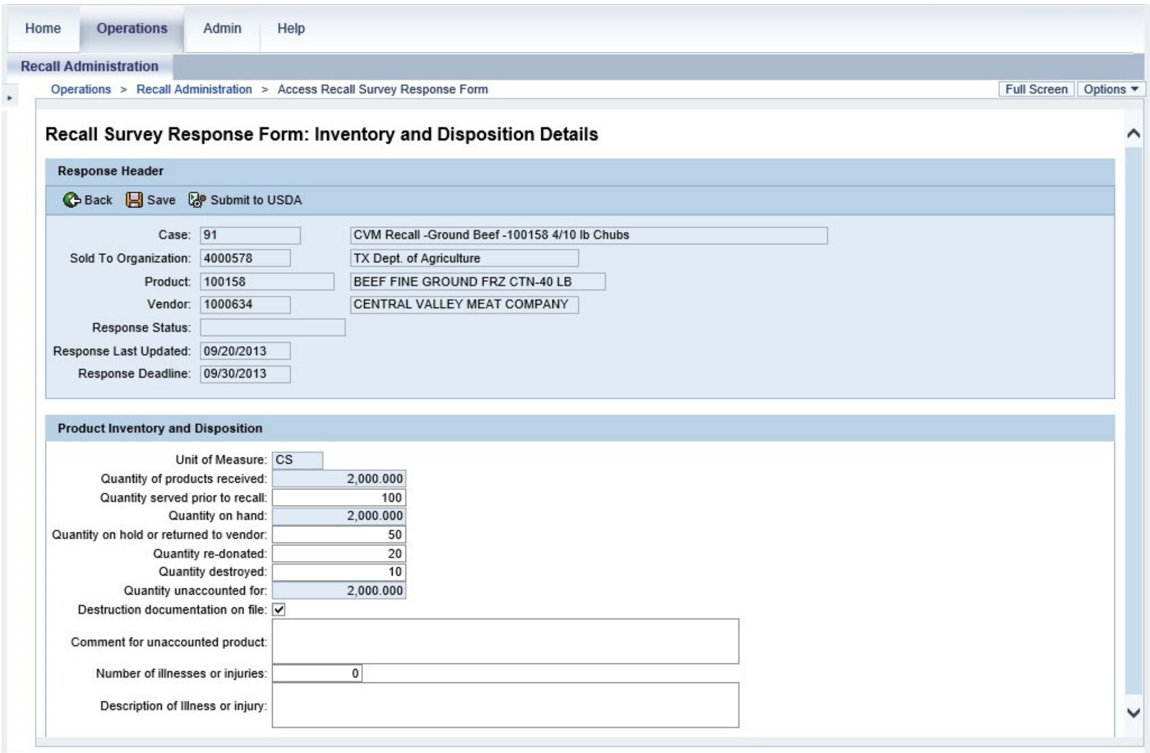
Field	R/O/C	Description
Quantity on hold or returned to vendor:	O	Quantity of product that is currently on hold or has been returned to the vendor. **Example:** 50
Quantity re-donated:	O	Quantity of product that has been or will be re-donated to another organization. **Example:** 20
Quantity destroyed:	O	Quantity of product that has been or will be destroyed. **Example:** 10

8. Perform one of the following:

If	Then
A record of the quantities being destroyed is on file	Click ☐ (the **Destruction documentation on file** checkbox).
There is no record of the quantities being destroyed on file	Go to Step 10.

(Note) The Recall Specialist enters disposition quantities for the recalled product in the *Product Inventory / Disposition* section.

Image: Access Recall Survey Response Form Screen



9. As required, complete/review the following fields:

Field	R/O/C	Description
Comment for unaccounted product:	C	Free form text field to enter a comment for any unaccounted product. (Note) The Recall Specialist must enter a comment in the **Comment for unaccounted for product** field for all unaccounted for product that is or will be destroyed.
Number of illnesses or injuries:	O	The number of people who reported illnesses or injuries related to the consumption of the product being recalled. **Example:** 2
Description of Illness or injury:	C	Free text field used to summarize the symptoms that were experienced by the people who reported illnesses and injuries. (Note) If the recall caused any illnesses or injuries, the Recall Specialist must include the number of injuries in the **Number of illness or injuries** field and a description of the injuries in the

Field	R/O/C	Description
		Description of Illness or injury field.

10. Perform one of the following:

If	Then
The form will be completed later and the user needs to save progress without submitting to USDA	Go to Step 11.
The form is complete and needs to be submitted to the USDA	Go to Step 12.

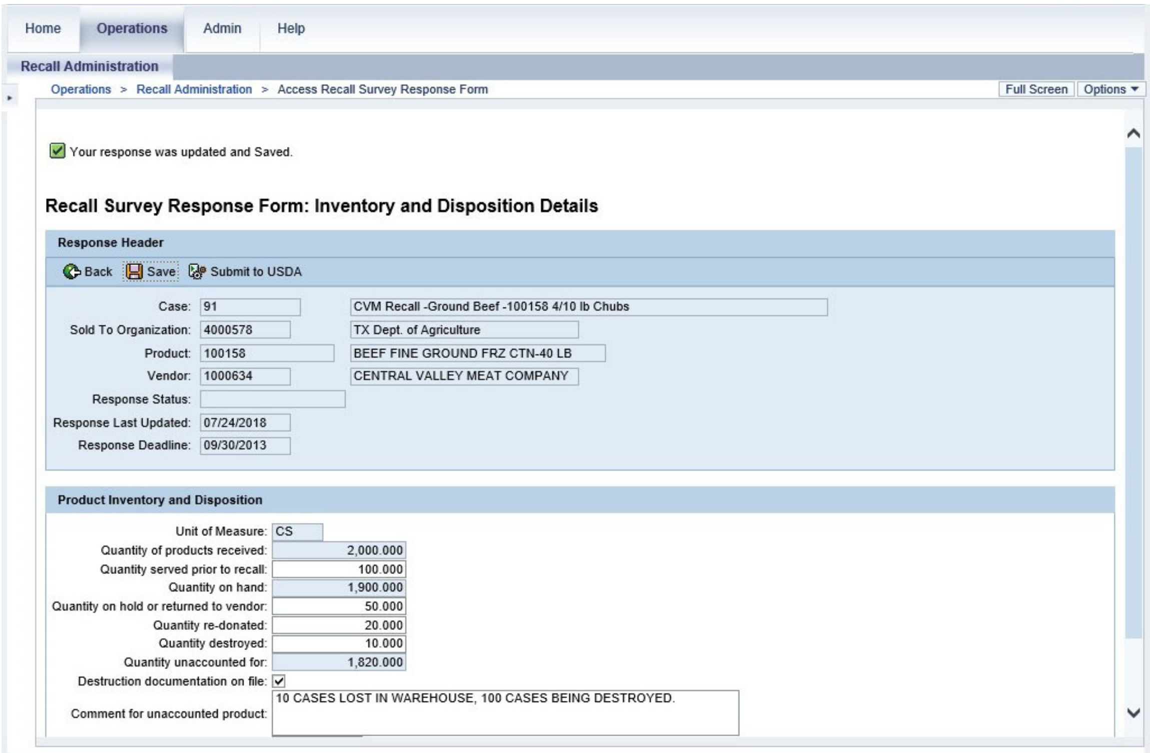
(Note) Note the three buttons in the *Response Header* section: each button can be used as follows:

- **Back** - Returns to the previous screen without saving. Does not save any changes to the form. When reviewing a previously submitted form, the Back button may be the only available option in the toolbar.
- **Save** - Saves progress on the form and changes the status to "In-Process". FNS will be able to view the responses; however the SDA/ITO Recall Specialist can make changes to the form as needed.
- **Submit to USDA** - Submits the form to USDA for review and changes the status to "Complete". At this stage, the SDA/ITO Recall Specialist can no longer edit responses, but an FNS Recall Specialist can make changes as needed.

11. Click Save (the **Save** button) to save the entries.

(Note) After clicking the **Save** button, the status changes to "In-Process" and a message displays "Response Saved / Updated".

Image: Access Recall Survey Response Form Screen



12. Click  (the **Submit to USDA** button) to submit the form to FNS.

(Note) After clicking the **Submit to USDA** button, the status changes to "Complete" and a message displays "Response Submitted to USDA". Once submitted, the SDA/ITO Recall Specialists will no longer be able to modify the form.

13. The transaction is complete.

RESULT

A response form associated with a recall case assigned to the organization has been submitted.

PROCESS OVERVIEW

Purpose

Users with the WBSCM Recall Contact role follow this procedure to update recall contact information. Recall contacts receive a notification when a commodity is put on hold or recalled. When a recall occurs, a user with the FNS Recall Specialist Notification role administers a recall notification that is sent to the recall contact user. The notification is delivered according to the Recall Contact's notification preferences, which may include:

- Email
- Telephone
- SMS (text message)
- Mobile Phone

Recall Contacts must have a minimum of two contact methods. The notification will initially be delivered through the Recall Contact's first notification preference. If no confirmation is received, the notification will be delivered through the second notification preference.

Access to the recall communication fields in the user profile only appear for those users with the Recall Contact role. Other users will not see these fields displayed in their user profile.

User Administrators (User Admins) can update general contact information through the **Manage Users** transaction; however, they cannot update recall contact information, which is only accessible to a Recall Contact through the **Maintain User Profile** transaction.

Process Trigger

Perform this procedure to review or update recall communication methods. Users must update their own profiles. This process is intended for the WBSCM user whose profile needs to be managed.

Prerequisites

- The WBSCM user must exist in the system.
- The user must have been assigned a USDA or SDA Recall Contact role.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab ➔ **Manage Users** folder ➔ **Maintain User Profile** link.

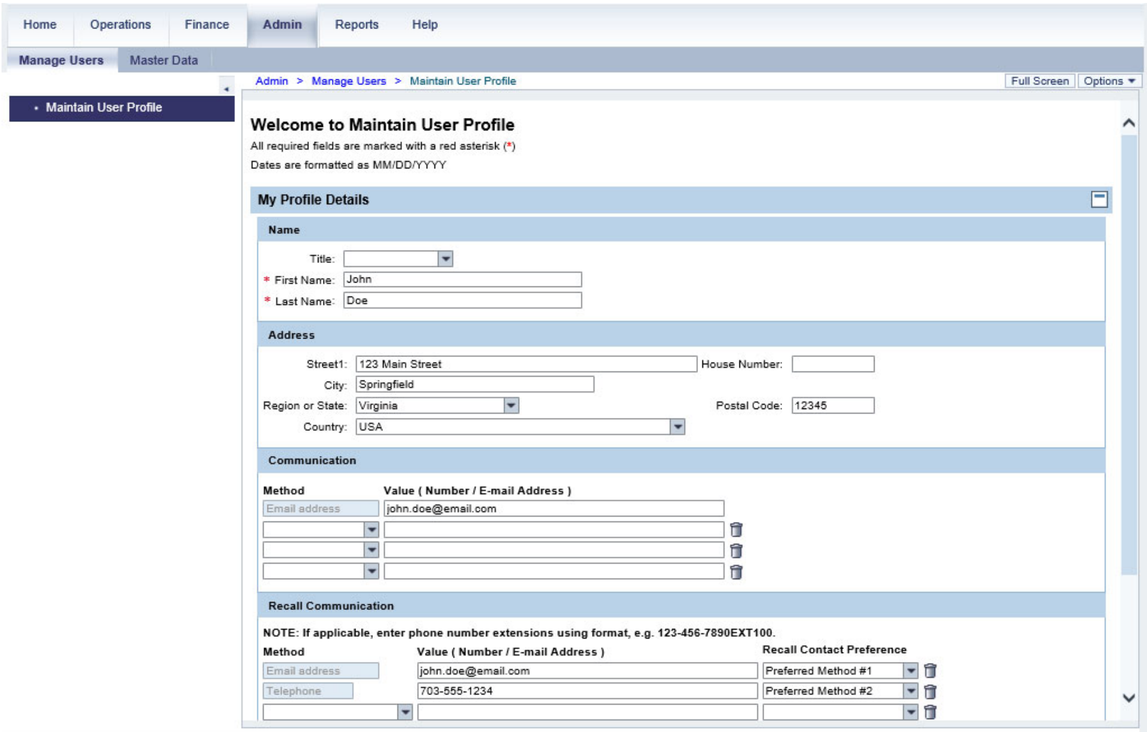
Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the Portal path **Admin** tab ➔ **Manage Users** folder ➔ **Maintain User Profile** link.

Image: Maintain User Profile Screen

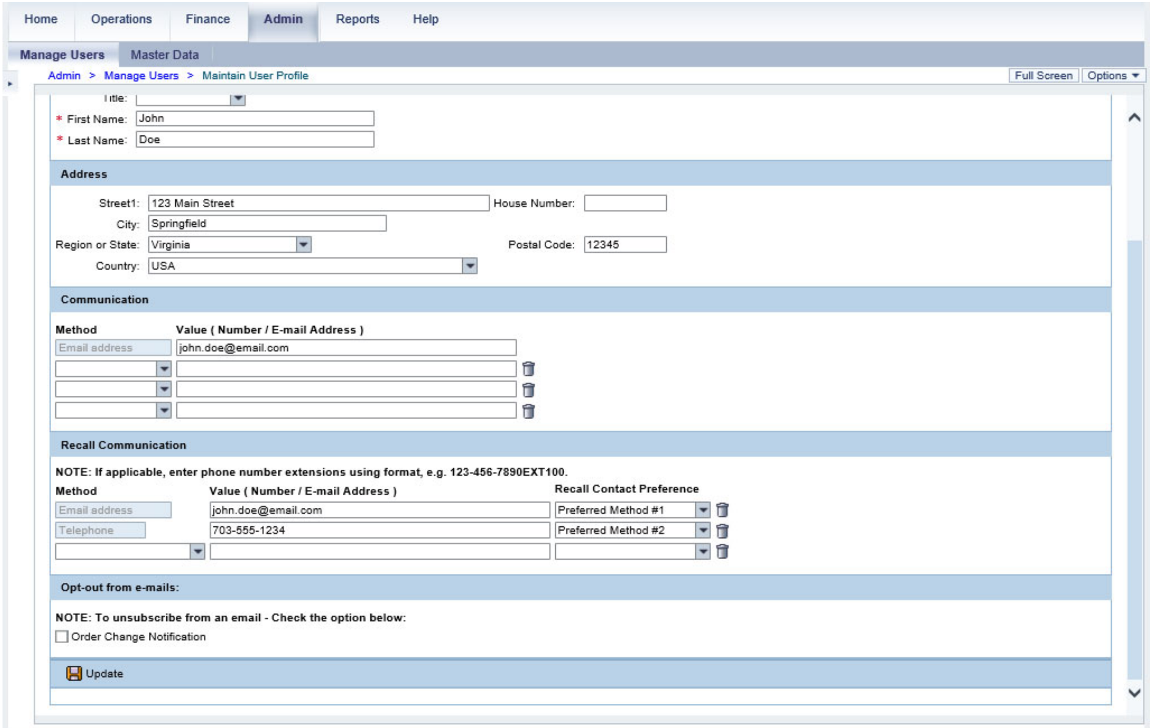


2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.

(Note) Only users with the Recall Contact role are able to see and edit fields in the *Recall Communication* section.

(Note) This document describes the use of the *Recall Communication* fields. To review and edit other parts of the user profile, use the **Maintain User Profile** work instruction.

Image: Maintain User Profile Screen



3. Perform one of the following:

If	Then
The user needs to add a new recall communication method	1. In the **Method** field, choose the type of communication from the available list of options 2. Enter the value in the **Value (Number / E-mail Address)** field. 3. Select the **Recall Contact Preference**.
The user needs to edit the value of an existing recall communication method	1. Click in the **Value (Number / E-mail Address)** field for the existing communication method. 2. Type the new value. 3. Select the **Recall Contact Preference**.
The user needs to change or delete an existing recall communication method	Click (the **Trash Can** icon) to clear saved fields. (Note) To add a new recall communication method to replace the one removed, see steps above.
The user does not need to make any changes to recall communication methods	Go to Step 4.

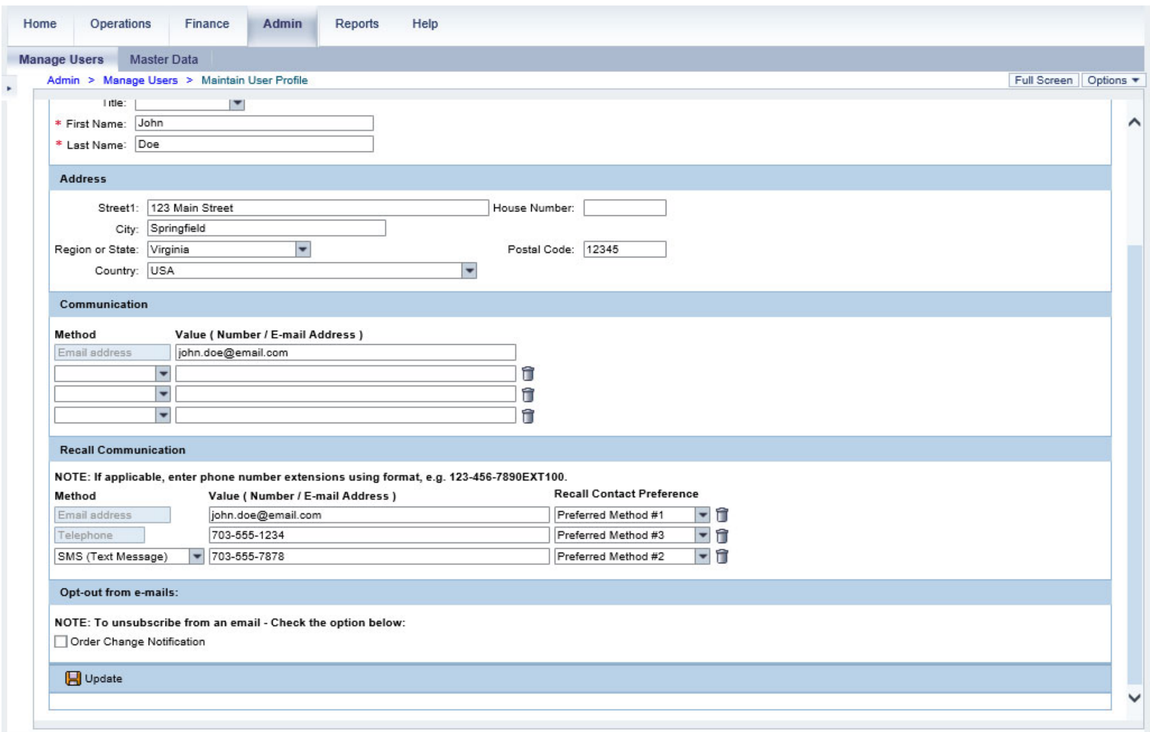
(Note) Available recall communication methods are **Email Address, Mobile Phone, SMS (Text Message),** and **Telephone.**

(Note) It is critical that the user regularly maintain their recall contact information to ensure that recall notifications are received immediately when a material has been placed on hold or recalled.

At a minimum, a Recall Contact must select at least two recall communication methods.

The Recall Preferences allow Recall Contacts to determine the order of the method in which recalls are communicated. **Preferred Method #1** is the communication method that is used first when products are recalled. If confirmation of receipt isn't received, the notification will be distributed via the next preferred method.

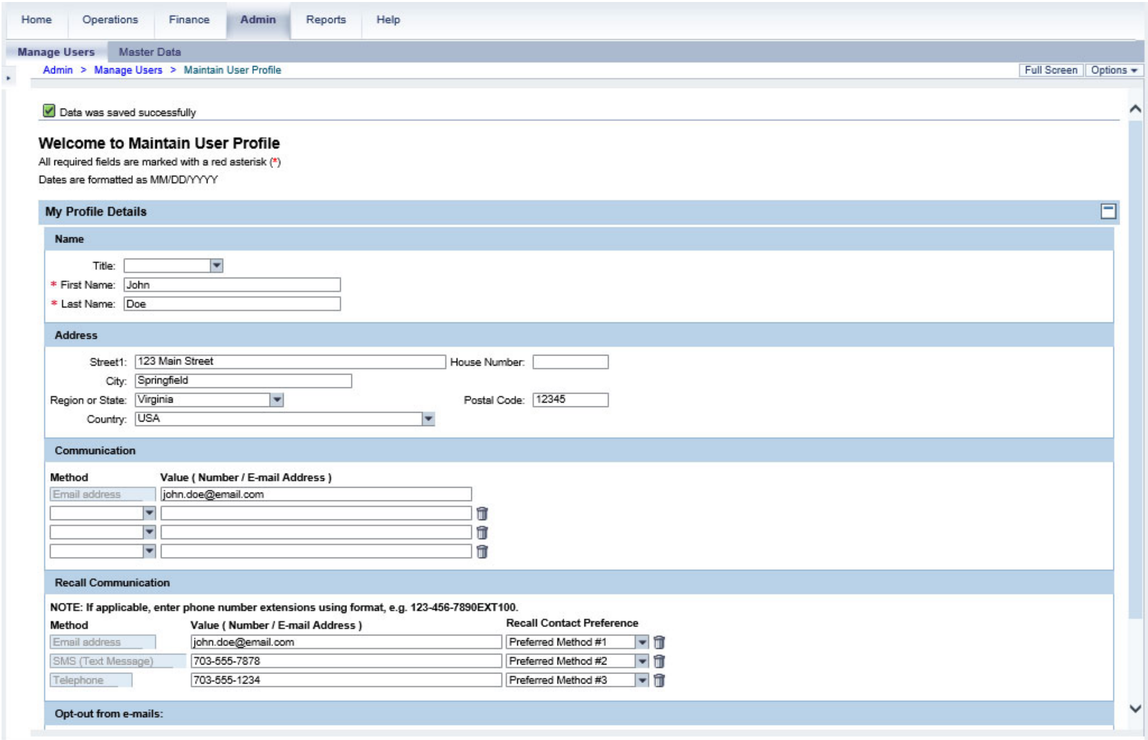
Image: Maintain User Profile Screen



4. Click Update (the **Update** button).

(Note) A message that the data was saved successfully is displayed.

Image: Maintain User Profile Screen



5. The transaction is complete.

RESULT

The recall communication information has been updated, including method, contact information, and the order of preference.