



PrimusGFS

Desk Reviews

User Guide for Auditee

PREPARED BY

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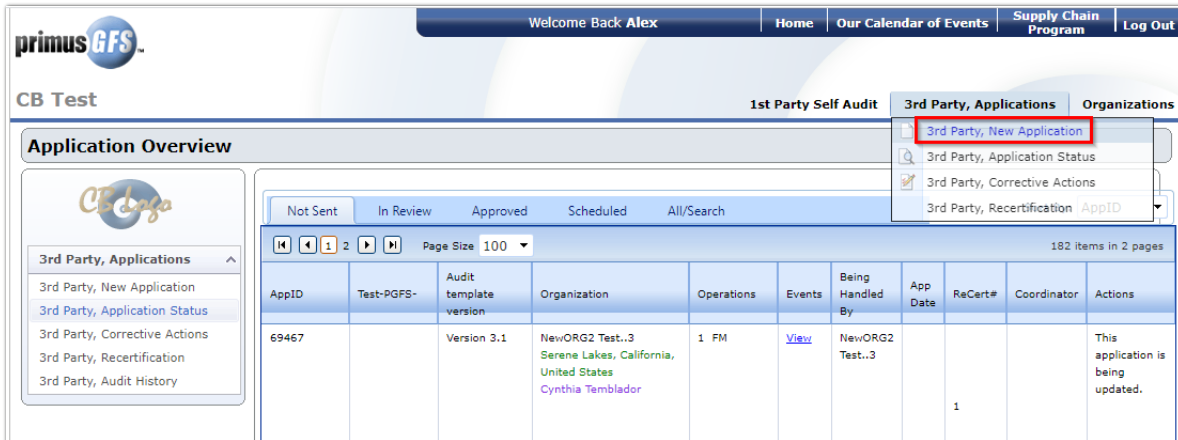
USA: +1 805.354.7127
+1 805. 862. 4219
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PrimusGFS.com

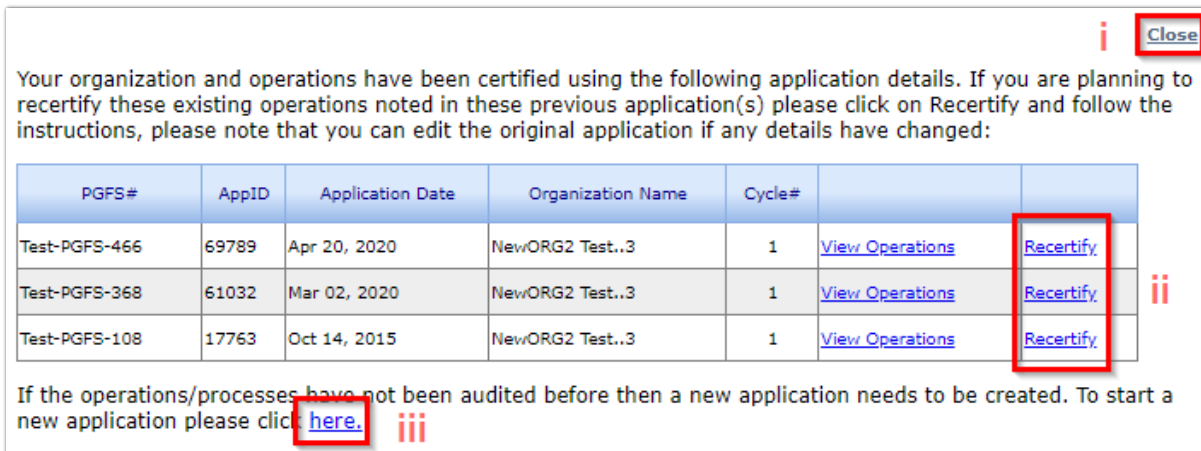
1. Scheduling the Desk Review

Once the user logs in into the PrimusGFS system, go to **3rd Party, New Application** to submit the application for the Desk Review audit.

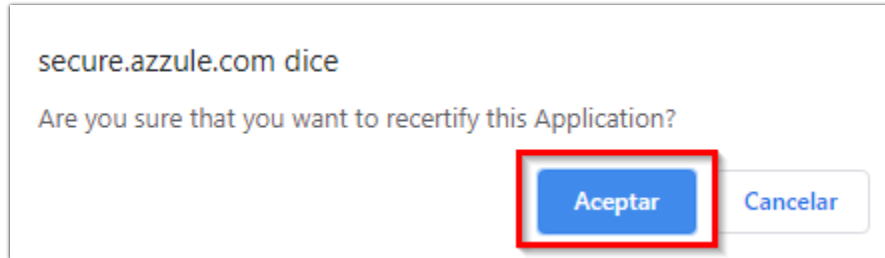


A pop-up window will be displayed to start a new application. The user will have 3 options:

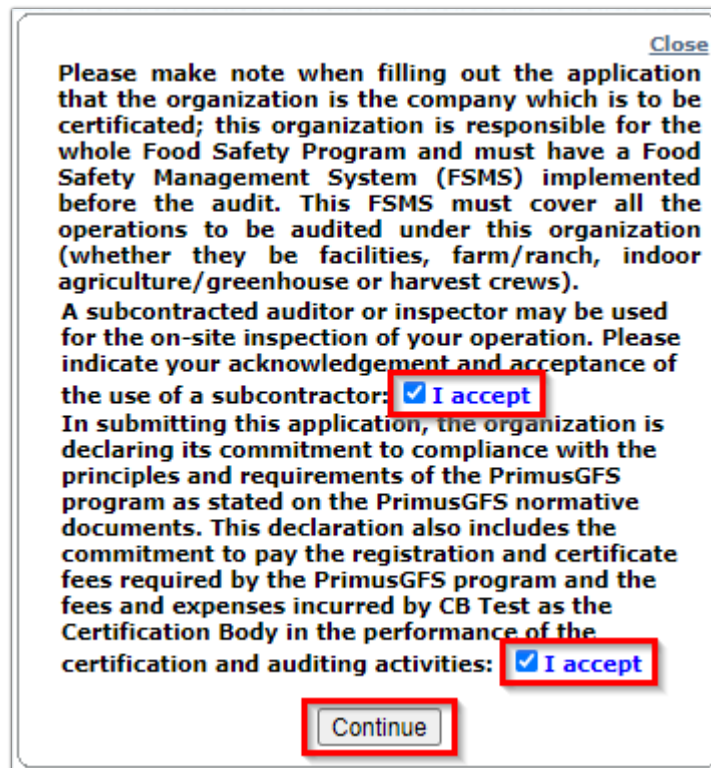
- i. **Close** the window to go back to the home page.
- ii. **Recertify** to start the Desk Review process on the selected organization
- iii. If the operations/processes have not been audited before then a new application needs to be created. To start a new application please click the **here** button.



Once the **Recertify** option is selected, a new pop-up will open. Click on **Accept** to go on with the process.



Read the text and check boxes to accept. Then click on **Continue** to go to the next step.



A new application will be generated for the PrimusGFS Registration Number. User may edit and add information to the application.

1. Organization Information – Review the general information of the organization. Select **Edit Organization Details** if the information is not accurate/updated.

① **Organization**

Test-PGFS-368
App. Not Sent
[Submit Application](#)

NewORG2 Test..3
[Edit Organization Details](#)

Organization Details

Organization:	NewORG2 Test..3	Billing Info	
Address:	2620 Skyway Drive, Suite B., California	Billing Name:	TEST123
Location:	Serene Lakes, California, United States	Tax Code:	
Postal Code:	1111111111	Address:	123 Skyway Drive, Suite B., Serene Lakes, California, United States
Phone Number:	805-270-52700	Postal Code:	1111111111
Fax Number:	805-270-52700	Phone Number:	805-270-52700
		Fax Number:	805-270-52700

Mailing Address

Address:	2520 Skyway Drive, Suite B..
Location:	Serene Lakes, California, United States
Postal Code:	1111111111

2. Contacts – Select the contact person(s) to receive notifications and show on the reports.

② **Contacts**
Select contact person(s) to receive communications and show on the reports:

Not in the list? [Add New Contact](#) You can also [Edit contact catalog](#)

Contact Name	
Alex Mojica	Select
Javier Sanchez	Select
Nadia Pasco	Select
nadia pasco	Select
Kerry Bridges	Select
Brenda López	Select

Contact Name	Show on Report(s)	
Alex Mojica	<input checked="" type="checkbox"/>	Remove

3. Operations – Please type in the below relevant information of the operation to be audited:
 - i. Select the Audit template version from the dropdown.
 - ii. Select the operation type. Choose between Cooling/Cold Storage, Farm/Ranch, Harvest Crew, Indoor Agriculture/Greenhouse, Packinghouse, Processing and Storage & Distribution Center.
 - iii. Select the operation from the dropdown. If new, please click on **Add New Operation**.
 - iv. Type in the product name and then **Search**.
 - v. Select the products available from the dropdown.
 - vi. Add the selected product by clicking on **Add Product**.
 - vii. Complete the product information, such as operation size, season and country of destination.
 - viii. Click on **Add Operation** to add the operation to the audit application.
 - ix. Once the operation is added, a summary will be displayed below. User may view products, edit the operation or remove it.

Audit template version: Version 3.1 i

3 Operations

Operation Type: Farm/Ranch ii

Operation Name: Snyder Ranch, 101, 102, 103 iii

Not in the list? [Add New Operation](#)

[Upload Documents](#)

Please enter the product group/name and then click on the "Search Product" button. Then select product group/name from the drop down list. If your product group/name is not visible, please contact primusgfs@azzule.com

A PDF of the PGFS product group/name listing is available [here](#)

Product Name: iv

Product: Select v

vi

Product Name	Operation Size	Year round?	Month Range	Country of Destination	
Apples vii	0.00	Select viii	Month	Month	Remove

viii

ix

Operation	Operation Type	Has Preventive Controls?	Products
Test Packinghousesss 01142019	Packinghouse	Yes	View Products Edit Remove

Total
1 Facility Operation

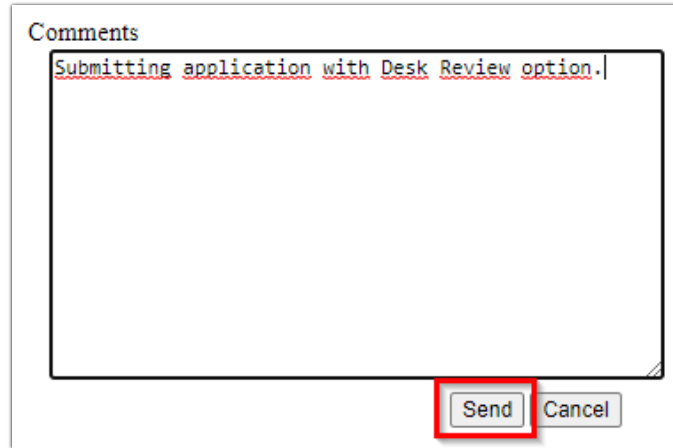
4. Options – Please note that in this section the user will be able to select the Desk Review option.

- i. Select the **Desk Review** checkbox to have your Certification Body review audit documents remotely.
- ii. Select dates for the on-site audit.
- iii. Select languages.
- iv. Add comments and click on **Save Options** to save.

5. Shippers – Add a shipper for your audit to distribute audit information. User may skip this step if no shipper.

- i. Type in the shipper name and click on **Search Shipper**.
- ii. Select shipper from the dropdown menu and click on **Add Shipper**.
- iii. User can either check the first box to certify that has the right to distribute the information or check the second box to skip this step if there is no shipper to add.
- iv. Click on **Submit Application** to save and submit.

Finally, user may add a comment and click on **Send** to have the application sent to the Certification Body.



Comments

Submitting application with Desk Review option.

Send Cancel



2. Submitting Documents

Once the Certification Body has approved the application, audit will be in **1st Party, Audit Data Entry > Scheduled**. It will be displayed as **Audit Template Version + Desk Review**. To start uploading relevant documents for remote review, select **Edit Audit** under the **Actions** tab.

CB Test									
1st Party Self Audit 3rd Party, Applications Organizations									
1st Party - Audit Data Entry									
 1st Party Self Audit <ul style="list-style-type: none"> 1st Party, New Audit 1st Party, Audit Data Entry 1st Party, Corrective Action 1st Party, Audit History 1st Party User Instructions 	Scheduled				Unfinished Prelim. Report		Preliminary Report Completed	Report/CA's Review Finished	
	App #	Test-PGFS-	Audit	Operation Type	Audit Template Version	Organization	Operations	Scheduled Date	Actions
	71108	368	207754	Farm	Version 3.1 + Desk Review	NewORG2 Test..3	Snyder Ranch, 101, 102, 103, 105 Location: Santa Maria, California, 93455, United States		Edit Audit Products
	71108	368	207753	Packinghouse	Version 3.1 + Desk Review	NewORG2 Test..3	Test Packinghouses 01142019 Location: Zephyrhills, Florida, 6985, United States		Edit Audit Products

The system will display the **Audit Information** tab first. Here, user may input all the relevant information for the audit, such as:

1. Audit Information – This section includes the written audit report language, time zone, hours, GPS coordinates and the scope.
2. GFSI Audit Scope(s) – Category associated with the operation (please check relevant boxes displayed).
3. Product Information – GFSI Products Showing on the Audit Report and Certificate.
4. Agronomic Inputs and Water Use – User must check the appropriate boxes applicable to the operation.
5. Location Information – User may review and confirm that the Organization and Operation locations are correct.
6. Additional Information – In this section user may include information of workers, size of the operation, adjacent land, etc.
7. Documents – This is an optional section intended to submit any relevant documentation related to the audit.

CB Test							
1st Party Self Audit 3rd Party, Applications Organizations							
Audit Information							
 1st Party Self Audit <ul style="list-style-type: none"> 1st Party, New Audit 1st Party, Audit Data Entry 1st Party, Corrective Action 1st Party, Audit History 1st Party User Instructions 	PGFS#: 368 Farm Audit 207754 for Snyder Ranch, 101, 102, 103, 105 Products: Apples			Auditor: <input type="text"/> Status: Unfinished Prelim. Report		<input type="button" value="Save all steps"/>	
	Self Audit / First Party Desk Review						
<div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid blue; padding: 5px; width: 20%;"> <p>1 Audit information Audit #207754</p> </div> <div style="width: 15%;"> <p>2 GFSI Audit Scope(s)</p> </div> <div style="width: 15%;"> <p>3 Product Information</p> </div> <div style="width: 15%;"> <p>4 Select Agronomic Inputs and Irrigation /Water Use</p> </div> <div style="width: 15%;"> <p>5 Location Information</p> </div> <div style="width: 15%;"> <p>6 Additional Information</p> </div> <div style="width: 15%;"> <p>7 Upload of Audit Documents (Optional)</p> </div> </div>							
Written Audit Report Language: <input type="radio"/> Spanish <input checked="" type="radio"/> English							

Once the audit information is saved, user may start submitting the documents. To do so, please go to the designated modules and select the question. Attachments for each question are enabled, so the user can start uploading in the **Attach files** option.

Module 1 - FSMS - Management System

1.01.01. Is there a documented food safety policy detailing the company's commitment to food safety?

Attach Files

Characters Left **510**

- ✓ Total Compliance
- Minor Deficiency
- Major Deficiency
- Non-Compliance
- N/A

A pop-up window will be displayed to upload documents.

- i. Click on **Browse** button to select the file.
- ii. Click on **Upload**.
- iii. The selected document will appear below when the file is successfully uploaded.
- iv. **Close** window to continue with the process.

Audit 206052

Question 1.01.01 - Is there a documented food safety policy detailing the company's commitment to food safety?

Step 1: Click on "Browse" button to select the file

Document Choose File i

**File size must be less than 10 MB.The file type should be .gif, .bmp, .jpeg, .wav, .avi, .mpeg, .pdf, .doc, .xls

Step 2: Click on "Upload" button

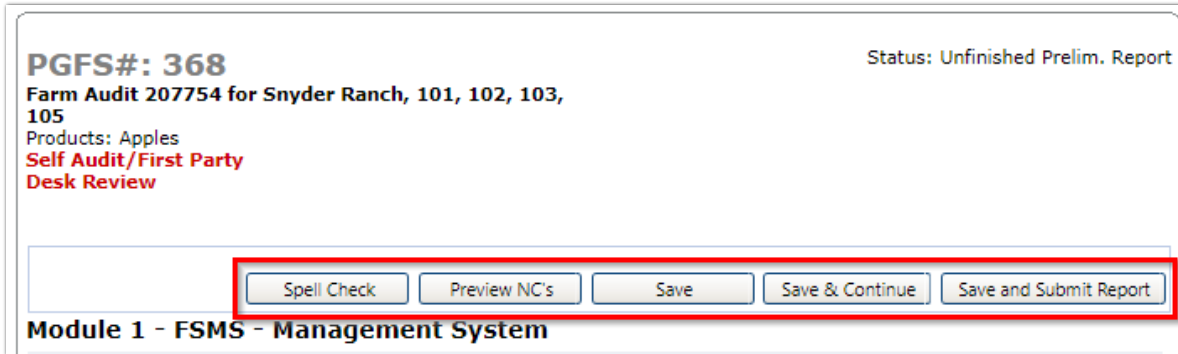
Upload ii

Your file was successfully uploaded

File Name	Update Date	
RH206052_T44_C1_S17_Q3064_S1269265.png	06/17/2020 12:07	Delete iii

iv Close Window

Auditee user may continue submitting documents for each question. To save the information and stay in the same page, click on **Save**. To save and go to the next section, click on **Save & Continue**. To finish the submission and send the documentation to the auditor for review, click on **Save and Submit Report**.



The screenshot shows a software interface for an audit. At the top left, it displays 'PGFS#: 368' in bold. To the right, the status is 'Status: Unfinished Prelim. Report'. Below this, the audit details are listed: 'Farm Audit 207754 for Snyder Ranch, 101, 102, 103, 105', 'Products: Apples', and 'Self Audit/First Party Desk Review' in red text. At the bottom of the interface, there is a row of five buttons: 'Spell Check', 'Preview NC's', 'Save', 'Save & Continue', and 'Save and Submit Report'. A red rectangular box highlights this row of buttons. Below the buttons, the text 'Module 1 - FSMS - Management System' is visible.

After the report is sent to the auditor for review, the process for Documentation Desk Review is completed.