I. PURPOSE

This directive instructs inspection program personnel (IPP), how to install and synchronize inspection data, manage coverage assignments, and troubleshoot in the Public Health Information System (PHIS) Disconnected State application.

**KEY POINTS:**

- **Discusses the activities IPP can conduct in the off-line Disconnected State application**
- **Provides detailed instructions and a quick reference guide on the PHIS Disconnected State application and how to synchronize inspection data**
- **Provide instructions to IPP on removing coverage assignments that are no longer needed**
- **Provides instruction on managing sample collection in the Disconnected State Application**

II. CANCELLATION

FSIS Notice 55-12 “PHIS Disconnected State and Offline Synchronization Application”

III. BACKGROUND

A. In January 2012, FSIS completed distribution of the PHIS Disconnected State application. The Disconnected State application is specially designed for off-line IPP who do not have network connectivity available at all plants on the assignment. This application allows these IPP to record critical food safety verification results while being disconnected from the FSIS network and to upload that data through a synchronization process once network connectivity is available.

B. FSIS replaced the original PHIS Disconnected State Application Installation Guide by providing separate guidance documents highlighting key points and information to help users navigate the application. This directive is accompanied with two guidance documents:

1. **PHIS Disconnected State Application Version 2.1 Reference Guide:** This is a comprehensive document with details on what functionality and menu options are available to IPP while working in the disconnected state. These options include data synchronization and resetting your database, removing coverage assignments, troubleshooting, information on IPP wireless EVDO software updates, and much more.
2. **PHIS Disconnected State Quick Reference Guide (Quick Reference Guide):** This is a two-page quick reference guide with helpful information to have handy on a day-to-day basis that will guide IPP through crucial and the most important features of the Disconnected State Application. The PHIS Disconnected State Application is designed to work in an offline capacity to allow IPP to perform essential verification activities when an FSIS network connection is not available.

C. The PHIS Disconnected State Application needs to communicate with the online version of PHIS regularly to transmit data entered while working in the disconnected state. The system does this by routinely (every 10 days or less) synchronizing to the on-line version of PHIS.

D. The PHIS Off-line Synchronization Application will store and manage 90 days of data for each establishment on the assignment. It is important to synchronize data every 10 days or more frequently if possible to prevent any loss of data, and to ensure that data in the off-line application is the same as in the on-line version of PHIS. Historical inspection data beyond the previous 90 days is available only in the PHIS on-line version (connected state).

IV. **ACTIVITIES CONDUCTED IN PHIS DISCONNECTED STATE**

While using PHIS Disconnected State Application and not connected to the FSIS network, IPP can do the following activities:

1. View a summary Establishment Profile;
2. View and document previously scheduled Inspection Tasks (directed or routine) and Results;
3. Schedule directed tasks;
4. Record and edit results of directed tasks;
5. Create, edit, and print noncompliance records; and
6. Create, edit, and print Memorandum Of Interview (MOI), except the establishment meeting MOI. The Disconnected State application does not support the use of the Agenda application.

V. **INSTALLATION AND SYNCHRONIZATION APPLICATION**

**NOTE:** The instructions below on installation only apply to IPP who do not have network connectivity at each establishment on their assignment (patrol or mini-circuit).

A. If IPP have not received the PHIS Disconnected State Application Installation CD they are to contact the FSIS Service Desk. The Service Desk will then mail the CD to IPP.

B. IPP are to contact the FSIS Service Desk to obtain a key code so they can install the PHIS Disconnected State Application CD. The FSIS Service Desk is open 24 hours, 7 days a week, and can be contacted by submitting a Footprints ticket at [http://service/footprints/](http://service/footprints/) or calling 1-800-473-9135. Once the Service Desk is contacted, the Service Desk will schedule an appointment directly with IPP to install the application. The Service Desk will prioritize scheduling appointments to make sure IPP who do not have network connectivity at each establishment on their assignment (patrol or
mini-circuit) have access to and use of the PHIS disconnected state application to record critical food safety information.

C. IPP are to plan their day to allow enough time to contact the Service Desk and complete the installation process.

D. The amount of time it takes to synchronize data is directly affected by the amount of data that is uploaded and downloaded during this process. The disconnected state application will attempt to synchronize all data for all establishments IPP have in their PHIS account including coverage assignments. In addition to network connection speed, amount of data is the largest factor in determining synchronization time. PHIS is designed to download and store 90 days worth of inspection data. If IPP retain a lot of data not applicable to their current assignment, it will only add to the overall data synchronization time and could cause other problems.

E. The larger the list of assigned establishments IPP have in their coverage assignment, the longer time it will take to synchronize all the data for each user.

VI. QUESTIONS

The PHIS Disconnected State Application Version 2.1 Reference Guide (Pages 17-21) has instructions on how to “troubleshoot” issues with the Disconnected State Application. However, IPP users of PHIS Disconnected State should contact FSIS Service Desk if they:

1. Do not have a Disconnected State Application installation CD available and need one mailed directly to IPP;

2. Once the CD is received, are ready to schedule an appointment for installation;

3. Have a question or trouble with resetting the PHIS database because synchronization was not done within 10 calendar days or more frequently;

4. Encounter corrupt data in the database; or

5. Have a question or trouble with the synchronization process.

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Department of State Health Services
PHIS Disconnected State Application
Version 2.1 Reference Guide
August 2013
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Introduction

The PHIS Disconnected State Application is comprised of several components. First there is the PHIS Disconnected State Updater. This component makes sure your laptop has the latest software. Then there is the PHIS Data Synchronization Application. This component copies data from the PHIS online version to your laptop and copies data from your laptop back to the FSIS network. There are two other components: PHIS – CSI (this includes SPHV and PHV, and PHIS – EIAO. This guide covers the PHIS Disconnected State Updater, the PHIS Data Synchronization Application, the PHIS – CSI components, and the PHIS – EIAO components. The PHIS – CSI component is for users with the Consumer Safety Inspector or State Inspector role for recording inspection results; the PHIS – EIAO component is for users with the EIAO/SEIAO role for recording results for Food Safety Assessments (FSA).

The overall goal of all these components is to allow you to record information in PHIS when you are not connected to the FSIS network. When you use the PHIS – CSI component, you can do these things:

- View a summary Establishment Profile
- View and document previously scheduled inspection tasks and results
- Schedule, record, and edit directed tasks
- Create, edit, and print noncompliance records
- Create, edit, and print MOIs (except Establishment Meeting MOIs)

When using the PHIS – EIAO component, you can record results to an FSA.

Your laptop needs to communicate with the online version of PHIS on a regular basis to transmit data you entered while you were not on the FSIS network; it does this via the PHIS Data Synchronization Application. To avoid data loss and having to reset your database, you must use the PHIS Data Synchronization Application to synchronize your data at least every 10 days, but you should use the PHIS Data Synchronization Application to synchronize your data as frequently as possible. If you are connected to the FSIS network and running the PHIS Data Synchronization Application in the background, it synchronizes your laptop’s data with the FSIS Network automatically every 60 minutes.

To ensure that the PHIS Data Synchronization application can synchronize automatically, you must open the application after each time you log on to your computer. In addition to the automatic synchronization, you can manually synchronize data at any time. For more information, see the “Data Synchronization” section.

Note: This application deals with a 90-day range of records. In other words, the PHIS Data Synchronization Application synchronizes only the Inspection Tasks, Inspection Results, Noncompliance Records, and MOIs from the last 90 days. While you may occasionally need to refer to something older than 90 days, a limit was set to save you time when transferring records. Historical information beyond the previous 90 days is available in the PHIS online version.
PHIS Disconnected State Menu Options

As you become more familiar with the PHIS Disconnected State Application you will find there are different components in the application. Each component has a corresponding menu option and some menu options run a combination of components. This section describes the two main menu items for Disconnected State Users (Consumer Safety Inspectors, State Inspectors, and EIAOs).

Figure 1 shows how these components are laid out in the menu structure (see Figure 1: Menu Structure):

- **PHIS – CSI**: *Use this menu option if you have the Consumer Safety Inspectors or State Inspector user role in PHIS.*
  If connected to the FSIS network, the PHIS Disconnected State Updater opens first and checks PHIS online for software updates. If it finds an update, it automatically installs it to your laptop. Then the PHIS Data Synchronization Application opens and checks for data changes. If it finds a change, it automatically synchronizes the data. This menu option will also open the PHIS application, which is where you can enter data for inspection tasks.

- **PHIS – EIAO**: *Use this menu option if you have the EIAO/SEIAO user role in PHIS.*
  If connected to the FSIS network, the PHIS Disconnected State Updater opens first and checks PHIS online for software updates. If it finds an update, it automatically installs it to your laptop. Then the PHIS Data Synchronization Application opens and checks for data changes. If it finds a change, it automatically synchronizes the data. This menu option will also open the PHIS application, which is where you can record results for FSAs.

![Figure 1: Menu Structure](image-url)
Opening the PHIS Disconnected State Application for the First Time

1. While connected to the FSIS network, go to Start > FSIS Applications > Inspection Assignments > PHIS > PHIS – CSI or PHIS – EIAO (depending on your PHIS role).

2. If the PHIS Update window appears (see Figure 2: The PHIS Update Wizard), follow the instructions to update your software; otherwise, go to the next step.

3. Next, PHIS checks for your database. If necessary, the PHIS Data Installation Wizard (see Figure 3: PHIS Database Installation Wizard) will download and update your database. Follow the instructions to complete the process.

Figure 2: The PHIS Update Wizard

Figure 3: PHIS Database Installation Wizard
4. When the process is complete, the PHIS Data Synchronization Application and the PHIS offline application will open. Since you are still connected to the FSIS Network, the PHIS Transfer page will open (see Figure 4: PHIS Transfer Page).

5. On the PHIS Transfer page, click “click here to continue” and disconnect from the FSIS network to begin using the PHIS Disconnected State.
Data Synchronization

These are the steps you follow when you want to synchronize your data between the PHIS Disconnected State Application and the PHIS online application. This process deals with a 90-day range of records. In other words, the PHIS Data Synchronization Application synchronizes only the Inspection Tasks, Inspection Results, Noncompliance Records, and MOIs from the last 90 days. While you may occasionally need to refer to something older than 90 days, a limit was set for how much data would be available offline to save you time when transferring records. Historical information beyond the previous 90 days is available in the PHIS online version.

Using the PHIS Data Synchronization application when connected to the FSIS network on a regular basis helps to ensure that both FSIS and the inspector have the most recent PHIS data available. The PHIS Data Synchronization application attempts to synchronize automatically every 60 minutes when the application is open and you are connected to the FSIS Network. **To ensure that the PHIS Data Synchronization application can synchronize automatically, you must open the application after each time you log on to your computer.** For more information, see the “To Synchronize Your Data” section.

As it is such a critical part of the process, you must synchronize at least every 10 days, but you should synchronize your data as frequently as possible. Use the PHIS Data Synchronization application before you disconnect your computer from the FSIS network and after you log on and re-connect your computer to the FSIS network for best results.

Just like you would need to open Microsoft Outlook to continually receive email messages, the PHIS Data Synchronization application must be open in order for the automatic synchronization feature to work. In addition to the automatic synchronization, you can manually synchronize data at any time. The next section explains how to synchronize data manually.

**REMININDER:** To avoid losing data and having to reset the PHIS Disconnected State, you must synchronize at least every 10 days, but you should synchronize as frequently as possible.
To Synchronize Your Data

1. Connect to the FSIS Network.
2. Click Start > FSIS Applications > Inspection Assignments > PHIS > PHIS – CSI or PHIS – EIAO (depending on your PHIS role).

When you open the PHIS Disconnected State using the PHIS – CSI or PHIS – EIAO link, it will automatically check for software updates, open the PHIS Data Synchronization Application (Figure 5: PHIS Data Synchronization Application), and open PHIS (off-line).

3. Click Synchronize.

Do not disconnect from the FSIS Network; do not put your computer to sleep; and do not power off your computer during synchronization. Depending on your network connection speed and the amount of data to upload and download, the synchronization process may take several minutes. When your synchronization is complete, the PHIS Data Synchronization Application will display information on your last successful and most recent data synchronizations.

NOTE: If you share a computer with other PHIS users, you each need to run the PHIS Data Synchronization application because the synchronization happens based on user. If you enter data in the PHIS Disconnected State and a colleague also uses the PHIS Disconnected State, your data is kept separately. Your data is not transferred to PHIS online when the other user synchronizes. Likewise, his or her data does not get transferred to PHIS online when you synchronize. To avoid data loss or having to reset your database, be sure to synchronize at least every 10 days and as frequently as possible.
Removing Coverage Assignments

If you no longer require access to establishments that have been added to your PHIS account as a Coverage Assignment, you should remove them. Removing extraneous Coverage Assignments can help reduce the size of your Disconnected State database and improve synchronization times. If, in the future, you require access to the establishments that are in a Coverage Assignment, you can re-add the Coverage Assignment. Please note that your database size and synchronization times will increase, especially for the first synchronization, after you add Coverage Assignments.

The following instructions explain how to remove Coverage Assignments.

1. Log on to the FSIS Network.
2. Open a web browser and log on to PHIS at https://phis.fsis.usda.gov.
3. Click Coverage Assignments.
4. Click Delete (the trash can icon) next to the Coverage assignment you want to delete.
5. In the popup window that says “Delete this Coverage Assignment?”, click OK.
6. Sign out of PHIS and close your web browser.
7. Open the PHIS Disconnected State Data Synchronization Application.
8. Click Synchronize.
9. After the synchronization is complete, log on to the Disconnected State Application as you normally would.
Using PHIS in the Disconnected State When Not on the FSIS Network

This section is intended for users with the Consumer Safety Inspector or State Inspector user role in PHIS. For users with EIAO/SEIAO user role, please refer to the PHIS FSA Reference Guide for information on using the PHIS Disconnected State. The PHIS Disconnected State lets you complete the following tasks when you do not have access to the FSIS Network.

- View a summary Establishment Profile
- View and document previously scheduled routine inspection tasks and results
- Schedule, record, and edit directed tasks
- Create, edit, and print noncompliance records
- Create, edit, and print MOIs (except Establishment Meeting MOIs)

To access the PHIS Disconnected State application when you are not on the FSIS network, select the menu item that corresponds with your PHIS role. The following instructions assume you have the Consumer Safety Inspector role.

1. From the Start menu, click FSIS Applications > Inspection Assignments > PHIS > PHIS - CSI. You should always start the Disconnected State application using this Start menu link.

   **NOTE:** When you click PHIS – CSI, the PHIS Disconnected State update window may appear when software updates are available for the PHIS Disconnected State. For more information, see Error! Reference source not found. on page 19.

2. When you use the PHIS Disconnected State application as a CSI, you have two options available from the left Navigation menu: Establishment Profile and Inspection Verification (see Figure 6).

![Figure 6: Select Establishment Window](image)
The available options under these two menu options are limited. For example, instead of displaying the Select Establishment option under the Establishment Profile, an option called My Establishments appears (see Figure 7: My Establishments). When you are not connected to the FSIS network, you can only see establishments to which you are assigned.

**Figure 7: My Establishments**

3. From the list on the Select Establishment page, you can click an establishment to view its establishment profile. The Inspection Verification menu is also available when using the PHIS – CSI component (see Figure 8: Inspection Verification Menu). Using this menu, you can work with your Inspection Task List, Inspection Results, and Noncompliance Records in much the same fashion as you do online. You can also create, edit, and print Memorandum of Interview (MOIs), except for Establishment Meeting MOIs.

**Figure 8: Inspection Verification Menu**
Looking at the functions that are common between PHIS online and PHIS Disconnected State, the main
difference is how you create directed tasks. See the Schedule Directed Tasks section on page 13.

**NOTE:** The options for Inspection Notes, Meeting Agenda, and Correspondence are not available in the PHIS
Disconnected State.
Schedule Directed Tasks
While using the PHIS Disconnected State, you can schedule directed tasks.

To schedule a directed task:
1. From the Navigation Menu, select **Inspection Verification > Create Directed Tasks**.
2. On the Directed Tasks Lists page, select the shift from the drop-down list to specify the shift you want to work with.
3. Find the task you want to create and click the red arrow in the Schedule as Directed column to schedule it (see Figure 9: Directed Tasks List).

![Figure 9: Directed Tasks List](image-url)
4. A pop-up window displays with a calendar and a Reason field (see Figure 10: Assign Directed Task Disconnected).

![Assign Directed Task Disconnected](image)

**Figure 10: Assign Directed Task Disconnected**

5. Enter a number in the appropriate date field. You can only schedule directed tasks within seven days of the current date.

6. For the Reason field, select a reason from the drop-down list.

7. Click **Save** to schedule the directed task.

8. After the task is scheduled, it appears on your Inspection Task List and you can start to work on it from there.

9. In order for the tasks to appear in PHIS online, make sure you synchronize your database once you have connectivity to the FSIS Network.
Printing
The following steps are for printing the establishment profile on a local printer when not connected to the FSIS network.

1. From the Navigation menu, click **Establishment Profile > My Establishments**.
2. From the list, select the Establishment that you want to work with. From your toolbar, select **File > Print** (see Figure 11).
3. From the Print dialog box, select your local printer and click **Print**.

![Figure 11: Printing to a Local Printer](image)
Note about Lab Sampling

Lab Sampling is not supported in Disconnected State. When in Disconnected State, you:

- Cannot see any lab sampling tasks that are visible on your task list in PHIS online
- Cannot create a new collector-generated lab sampling task
- Cannot schedule a lab sampling task

If you want to collect Lab Sampling data while not on the FSIS network, schedule your Lab Sampling tasks and print two copies of the corresponding Lab Sample Collection forms while still connected to the FSIS network. Use the forms as a reference for hand-writing the required information on the form about the sample on both copies of the form. Sign and date one copy of the form and place it in the sample box to the lab. When you return to PHIS online use your hand-written notes to complete the electronic sampling information and submit it through PHIS. For more information, please refer to *FSIS Directive 13000.2*. 
Troubleshooting
This section explains common issues that you can resolve yourself. If you need assistance or an issue is not covered in this section, FSIS Service Desk by leaving a Footprints ticket at http://service/footprints or by calling 1-800-473-9135.

Reset Your PHIS Database
You may need to reset your Disconnected State database when any of the following occur:

- You did not synchronize your data within the 10-day retention window.
- The database on your computer has corrupt data.
- You can no longer successfully synchronize.
- An additional role was added to your PHIS account.

With the latest version of the PHIS Disconnected State (version 2.0), you can reset your PHIS database yourself.

WARNING! If you reset your database, you will lose any data that was entered while disconnected since your last successful synchronization.

To reset your database:
1. Connect to the FSIS Network.
2. Click Start > FSIS Applications > Inspection Assignments > PHIS > PHIS – CSI or PHIS – EIAO (depending on your PHIS role).
3. In the PHIS Data Synchronization Application, click Reset Database...
4. In the Reset the Local Database window (see Figure 12: Reset the Local Database window), read the information in the window and click Reset Database if you are certain you want to reset. Depending on the size of your database, the reset process could take several minutes. Do not disconnect from the FSIS Network during this process. When the process is complete, you will be able to synchronize again.

![Figure 12: Reset the Local Database window](image)
**PHIS Transfer Page**

If you try to start the PHIS Disconnected State application and the application finds an active connection to the FSIS network, the PHIS Transfer page appears (see Figure 13). If this happens, you have a choice of whether to go to the online version or continue as if you do not have a connection to the FSIS network. Follow the on-screen instructions.

![Figure 13 – PHIS Transfer Page](image)

**Another Instance is Running Message**

If you try to open the PHIS Data Synchronization application through the Start menu and it is already running, the “Another instance of the PHIS Data Synchronization is already running” alert appears (see Figure 14: Another Instance is Running Message). Click OK to dismiss the message and open the current instance.

![Figure 14: Another Instance is Running Message](image)
Database Not Available Message
If you get an error message that states “Database not available”, please contact the FSIS Service Desk by leaving a Footprints ticket at http://service/footprints/ or by calling 1-800-473-9135.

Account Inactive or Missing Role
If you receive any of the following error messages, please contact the FSIS Service Desk by leaving a Footprints ticket at http://service/footprints/ or by calling 1-800-473-9135 and providing the error message in the ticket:

- Your local PHIS database, which corresponds to your FSIS NT Login name, was not found on this computer. The database is required to work with PHIS in disconnected mode (offline).
- Your local PHIS database is corrupt and must be reset. The database change tracking feature is not enabled.
- Your local PHIS database is corrupt and must be reset. Information (data context ID) required for data synchronization is missing.
- Your local PHIS database must be reset because your have not synchronized within the synchronization retention period.
- The database exists, but it was marked for resetting. The database must be reinstalled.

Internet Explorer Cannot Display the Webpage Error
Typically, starting the PHIS Data Synchronization application automatically starts the Internet Information Server (IIS) Express. If this doesn’t happen, you may get an Internet Explorer cannot display the webpage error (see Figure 15).

If you get this error, follow these steps:

1. From the Start menu, click FSIS Applications > Inspection Assignments > PHIS > PHIS.

![Figure 15: Internet Explorer Cannot Display the Webpage Error](image)
Last Logged In User Error
If you try to access PHIS by selecting Start > FSIS Applications > Inspection Assignments > PHIS > PHIS – CSI or PHIS – EIAO and receive a “Server Error in '/CSI' Application” or “Invalid object name ‘LastLoggedInUser’” error, this typically means that you do not have the correct user role (Consumer Safety Inspector or State Inspector) or a disconnected state database. If you are trying to access PHIS online, to access PHIS Online go to https://phis.fsis.usda.gov or Start > FSIS Applications > Inspection Assignments > PHIS > USDA FSIS PHIS Online.

If you try to access the PHIS Disconnected Application for the first time, without downloading the database, you will get the Server Error in '/CSI' Application, Invalid object name ‘LastLoggedInUser’ error. Instead go to Start > FSIS Applications > Inspection Assignments > PHIS > PHIS – CSI or PHIS – EIAO (depending on your PHIS role), and click Synchronize in the PHIS Data Synchronization Application. See Data Synchronization on page 7.

Reducing Synchronization Times
Synchronization time varies based on your internet connection speed, network traffic, and the amount of data you are attempting to synchronize. You may be able to improve your synchronization experience by removing coverage assignments that you no longer require access to. Removing extra coverage assignments will help reduce the amount of data that is transferred between your computer and the remote server. To remove a coverage assignment, follow the steps outlined in Removing Coverage Assignments on page 9.

Verifying Component Installation
Sometimes a Service Desk technician may ask you to verify that all the PHIS Disconnected State components are installed. To do this, follow these steps:

1. From the Start menu, click Run.
2. In the Open field, type c:\batchwin\phis_dsa_app_check.exe (see Figure 16).

   ![Figure 16: PHIS_DSA_App_Check.exe File](image)

3. Click OK.
   A PHIS Disconnected State Applications window appears. Each item listed in the dialog box should have the Installed note next to it (see Figure 17).
4. On the PHIS Disconnected State Applications window, click OK.
NOTE: If this file is not on your local drive or any of the components are not installed, please contact the FSIS Service Desk by leaving a Footprints ticket at http://service/footprints or by calling 1-800-473-9135.

**Wireless (EVDO) Card Updates**

If you use a wireless card, sometimes referred to as EVDO cards, through Sprint, AT&T, or Verizon to access the Internet and FSIS Network, you may be prompted to update your wireless card software. There are three types of updates that are sent to your computer by the wireless carriers: Preferred Roaming List updates, Device Firmware updates, and Connectivity Software updates. For each update type, please follow the instructions listed in the following table.

<table>
<thead>
<tr>
<th>Update Type</th>
<th>Purpose</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preferred Roaming List (PRL)</strong></td>
<td>This type of update can help maximize connectivity potential by providing updated cell tower information to your device.</td>
<td>When prompted to update a PRL, follow the instructions on the screen to proceed.</td>
</tr>
<tr>
<td><strong>Device Firmware</strong></td>
<td>Firmware updates typically help fix bugs, data packaging, and cell tower communication issues.</td>
<td>When prompted to update device firmware, proceed with the instructions on the screen.</td>
</tr>
<tr>
<td><strong>Connectivity Software</strong></td>
<td>Connectivity Software updates can include enhancements and fixes to vendor-provided software, such as Sprint Smartview and VZ Access Manager.</td>
<td>If prompted to update your connectivity software, contact the FSIS Service Desk at 1-800-473-9135.</td>
</tr>
</tbody>
</table>

**NOTE:** If at any time you are not sure how to proceed with an update, please contact the FSIS Service Desk by leaving a Footprints ticket at http://service/footprints or by calling 1-800-473-9135.