

Retail Standards Assessment Tool User Guide

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Purpose

NEHA's new Retail Standards Assessment (RSA) Tool streamlines the completion of the Self-Assessment of All Nine Standards (SA9) and Comprehensive Self-Improvement Plan (CSIP) by providing a standardized, cloud-based platform modeled after [FDA's Gap Analysis spreadsheet](#).

NEHA developed the RSA Tool for many reasons. First, the tool helps to standardize the formats of SA9 and CSIP submissions so that all jurisdictions are working from the most recent version of the Retail Program Standards. Secondly, the tool creates a more user-friendly experience for jurisdictions completing their SA9 and CSIP, making these documents more sustainable and accessible to multiple users from the same jurisdiction. Finally, the tool will help NEHA and the FDA better collect data on Retail Program Standards progress across the nation.

This guide is meant to walk you through the steps of using the tool. While modeled off the FDA Gap Analysis spreadsheet, we wanted to provide users with a full user guide that covers all the features and nuances of this new tool.



Process Overview - Administrator

1. Log In

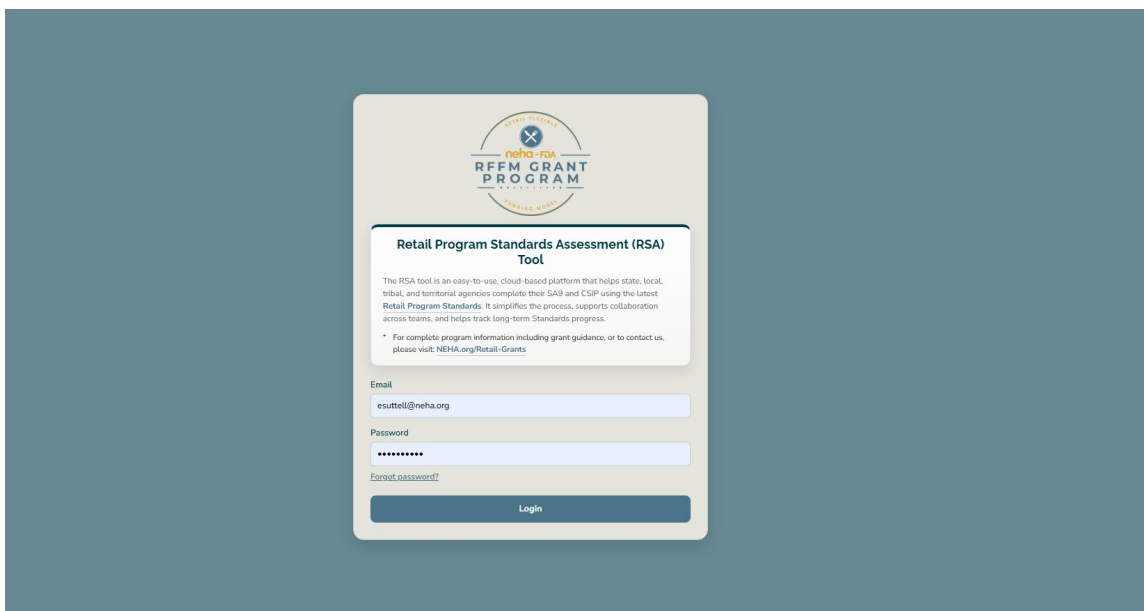


Figure 1: Log-in Screen

To begin, navigate to the RSA Tool login page and enter your email and password. After logging in, you can review tutorial pages designed for both administrators and self-assessors. Click the *Continue* button at the bottom of the page to proceed to the main tool interface.



Welcome, Admin

This guide walks you through your Admin workspace and how to oversee CSIP progress, manage users, and complete the FDA form submission.

Workspace Switching

As an Admin you have **elevated access** and can switch contexts:

- Use the **profile dropdown** (top-right) → *Switch Workspace* to jump between **Admin** and **Self-Assessor** views.

SA9 Selection

Use the **SA9 selector** to set the active SA9 you're reviewing. All dashboards, exports, and management actions apply to the selected SA9.

Profile & Preferences

- Update your profile details
- Switch site themes
- Change your password (enforces strong password policy)
- Switch Workspaces
- Log out

Progress Overview

The Admin dashboard shows overall progress and per-Standard breakdowns for the active SA9. Use it to spot gaps and drill in as needed.

Project Management

- **Invite Self-Assessors** (email invite flow with expiring link).
- **Assign Standards** and track per-user progress bars.
- Revoke access if needed (idempotent and auditable).

Invite Management

- **Track Self-Assessor** invites.
- **Resend/cancel** Self-Assessor invites.
- View status of an invite.

Self-Assessor Request

- **Approve/Deny Helper Requests** to grant temporary access to subparts/subsections (auto-approve in specific cases).

Reports & Exports

Export CSIP data to CSV or a printable PDF view of SA9.

FDA Submission

Once the active SA9 reaches 100% (all required action items accounted for), the **Submit to FDA** flow is available. Upload the required Form 3958 and finalize submission from the Admin workspace (you can do this in one file at the end or as you complete the Standards).

Video Walkthrough

Coming Soon!

Continue

Figure 2: Admin Landing Page

Upon opening the tool, you may see a message that reads “**Screen Size Not Supported**” if you are using a laptop with no external monitor. To fix this, all you need to do is zoom out your web browser.

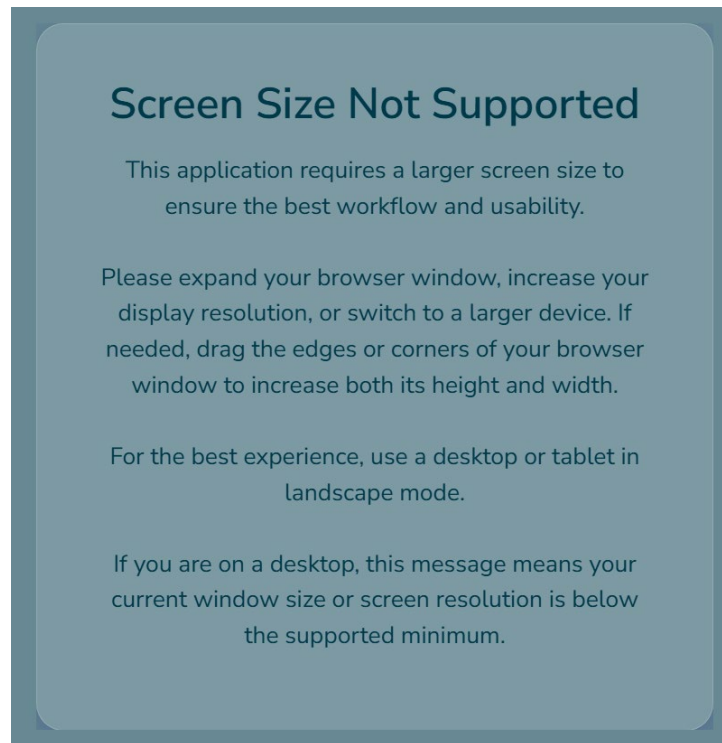


Figure 3: Screen Size Not Supported Error



2. Access the Admin Workspace

If you are both an administrator and a self-assessor, you can switch to the Self-Assessor Workspace at any time to edit your SA9 or CSIP directly.

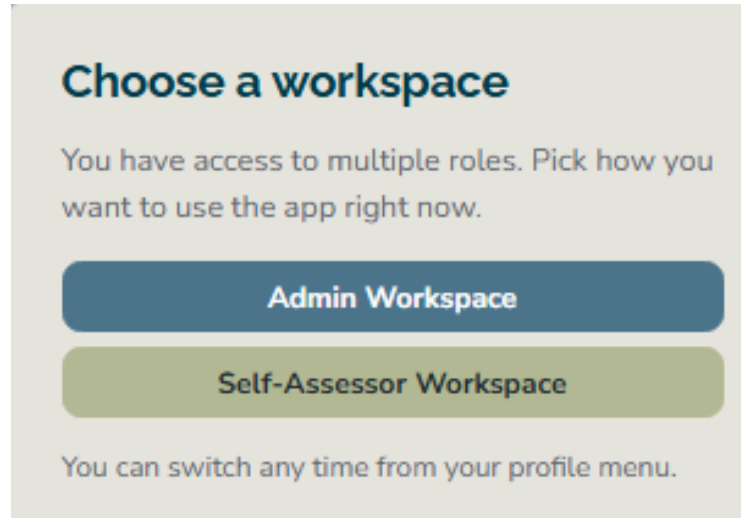


Figure 4: Choose a Workspace

Administrators have access to a comprehensive workspace that includes an overview of all projects and tools to manage SA9 and CSIP activities. From here, you can create and manage projects, add and manage users, and view project progress.

The Self-Assessor Workspace is for you to directly edit the SA9 and CSIP yourself if you are the admin; we will cover this workspace later. This is the same workspace your team who are not administrators will have access to in order to complete their Self-Assessment and CSIP work.



3. Step 1 - 1a: SA9 Selection

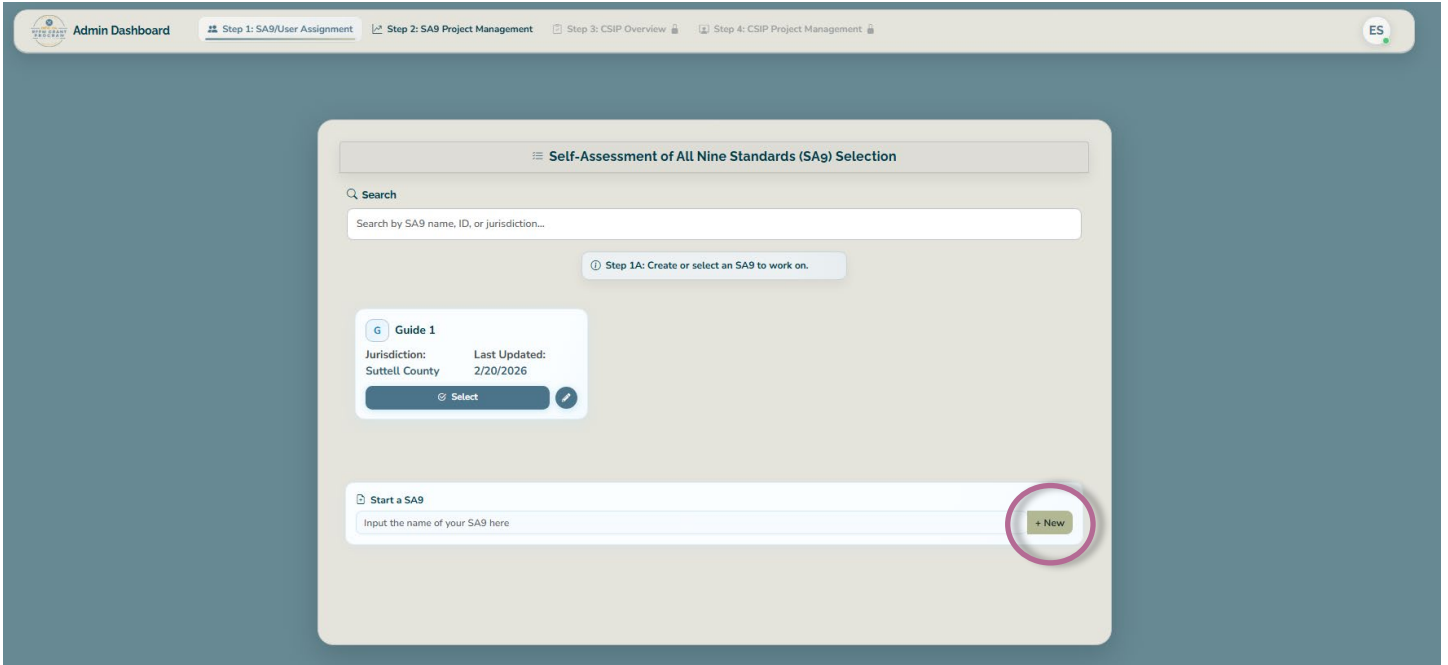


Figure 5: Select or Create an SA9

To begin your self-assessment, go to the SA9 Selection tab. Click the + New button to create a new SA9.

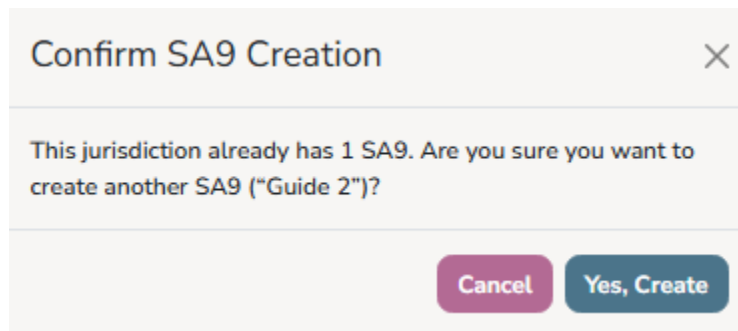


Figure 6: Confirm SA9 Creation



You may create multiple SA9s to reflect different self-assessment periods. Each record can be renamed for clarity using the *Edit* button (the pencil icon).



Figure 7: Multiple SA9 Records

4. Step 1 – 1b: Add and Assign Users to SA9

Once an SA9 is created, you can assign users to help complete the self-assessment. Click *Select* on your SA9 record to access assignment options. Administrators automatically have access to all nine Standards.

To add staff, click *Add Assignee* and enter their details; an invitation will be sent automatically. You can monitor invitation status under the *Manage User Invites* tab, where you can also resend or cancel invitations.



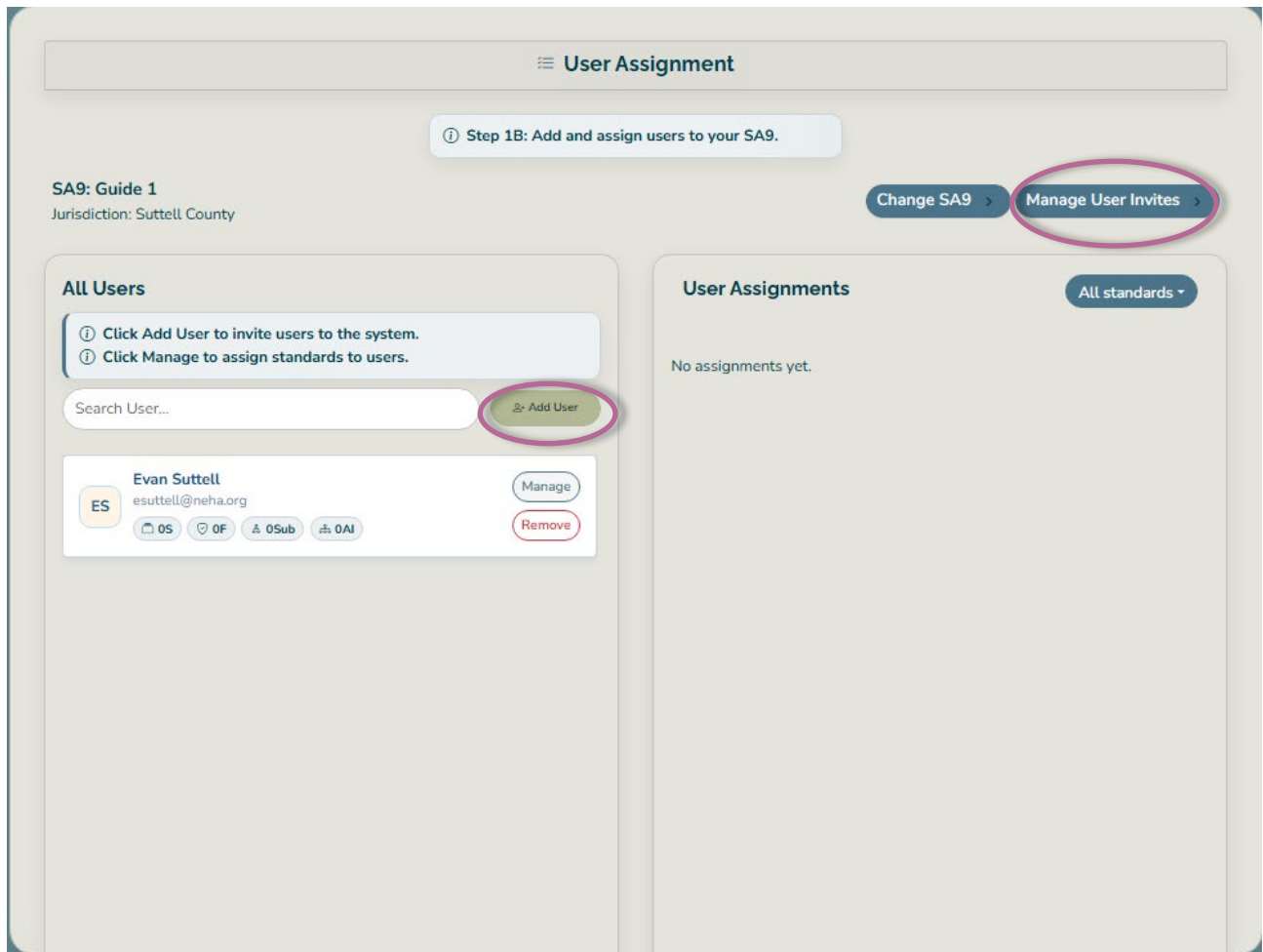


Figure 8: User Assignment Screen with Add User and Manage User Invites highlighted



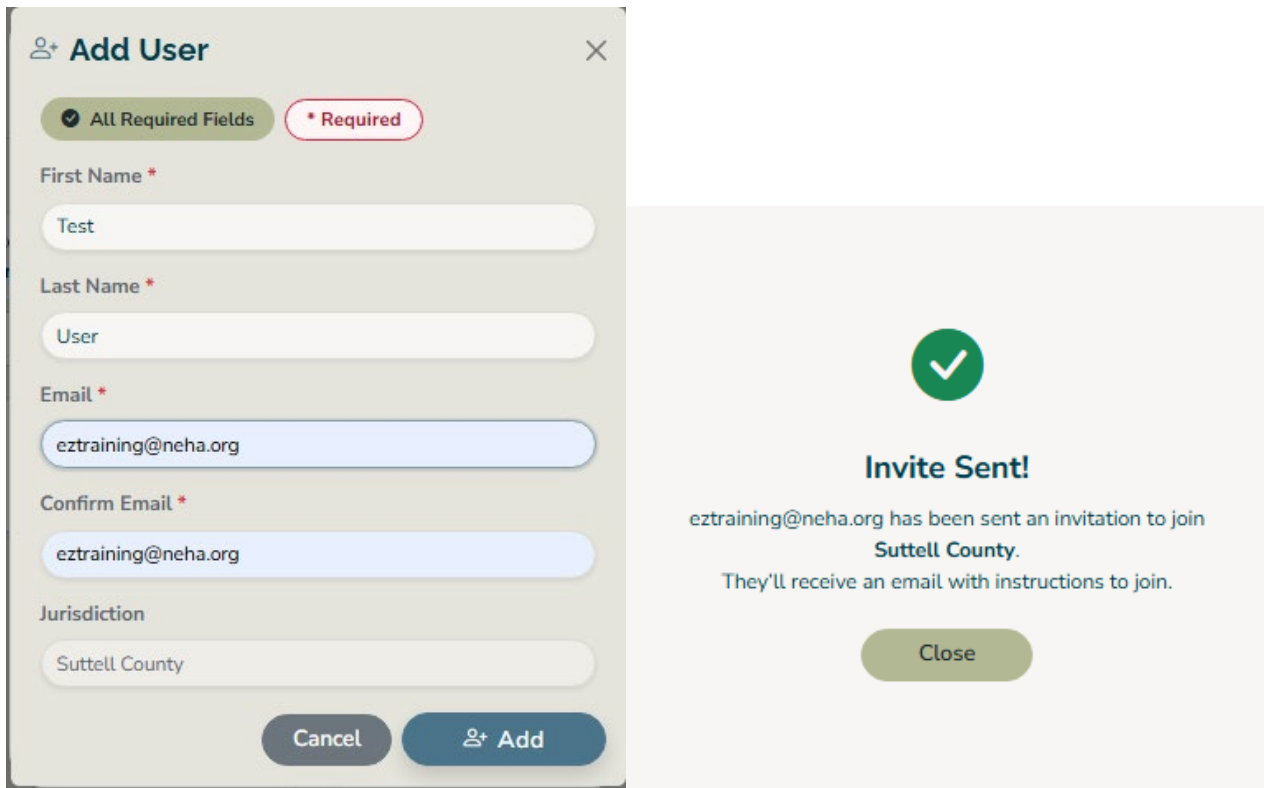


Figure 9: Invite Self-Assessor

You can check the status of the invitation by clicking the *Manage User Invites* tab at the top right of the **User Assignment** screen. You can resend and cancel invites in the *Manage User Invites* tab and see whether an invite is pending or has been accepted.

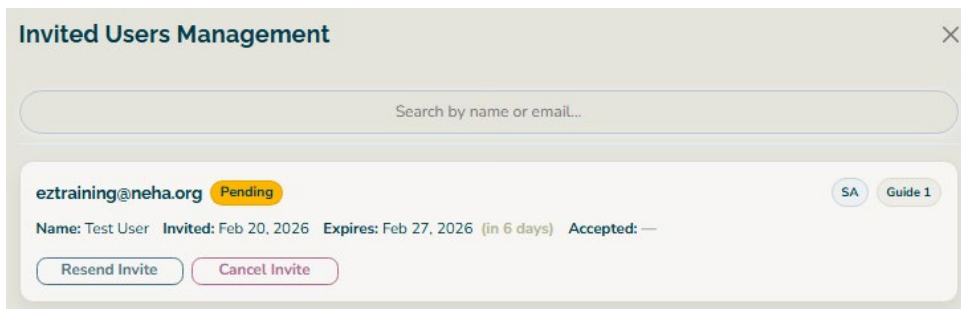


Figure 10: Pending User Invite

User status will change from “Pending” to “Accepted” when the user creates a log-in.



Invited Users Management



Search by name or email...

eztraining@neha.org **Accepted**

SA

Guide 1

Name: Test User Invited: Feb 20, 2026 Expires: Feb 27, 2026 Accepted: Feb 20, 2026

Resend Invite

Cancel Invite

Figure 11: Accepted User Invite



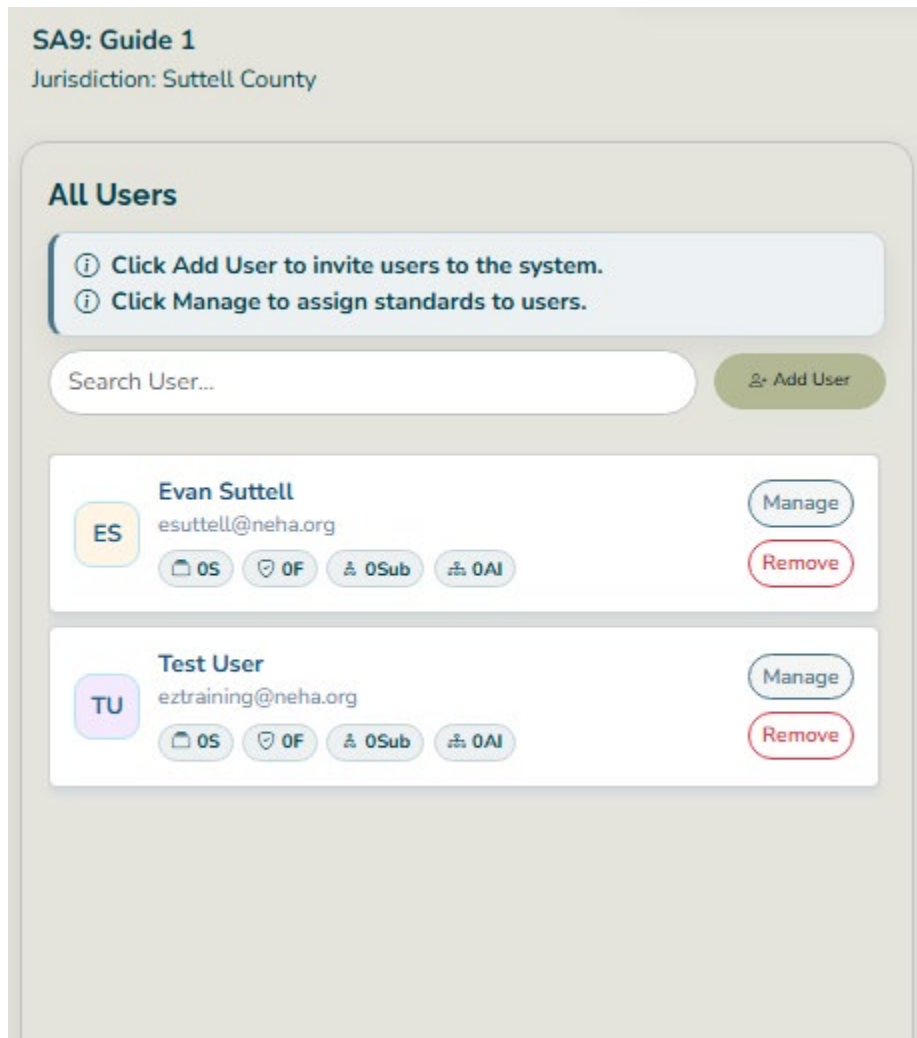


Figure 12: List of Self-Assessors who have Accepted an Invite (as well as Administrator)

After a user accepts the invite and creates their account, the admin will be able to assign specific Standards or sub-elements to the Self-Assessor via the *Manage* button. You can also assign yourself specific Standards, but the admin will have access to all 9 Standards by default.

You can grant full or partial access for each Standard to a user depending on their role. Use the check box on the left side to assign Standard access. You can also assign a target date for completion of each Standard's assessment. This date represents when the self-assessment should be completed, not when the Standard must be met.

Assign Standards to Test User <eztraining@neha.org> Self-Assessment

Select standards, set target dates, and toggle Full access or pick subsections per standard. Fill empty with

Standards

Search standards... 4 selected

Standard	Title	Access	Target date	Status
<input checked="" type="checkbox"/> S1	Standard 1: Regulatory Foundation	<input checked="" type="checkbox"/> Full access	<input type="button" value="Set date"/>	Full access No date yet
<input type="checkbox"/> S2	Standard 2: Trained Regulatory Staff	<input type="checkbox"/> Full access	<input type="button" value="Set date"/>	Not selected <input type="button" value="−"/>
<input checked="" type="checkbox"/> S3	Standard 3: Inspection Program Based on HACCP Principles	<input checked="" type="checkbox"/> Full access	<input type="button" value="Set date"/>	Full access No date yet
<input type="checkbox"/> S4	Standard 4: Uniform Inspection Program	<input type="checkbox"/> Full access	<input type="button" value="Set date"/>	Not selected <input type="button" value="−"/>
<input type="checkbox"/> S5	Standard 5: Foodborne Illness and Food Defense Preparedness and Response	<input type="checkbox"/> Full access	<input type="button" value="Set date"/>	Not selected <input type="button" value="−"/>
<input checked="" type="checkbox"/> S6	Standard 6: Compliance and Enforcement	<input checked="" type="checkbox"/> Full access	<input type="button" value="Set date"/>	Full access No date yet
<input checked="" type="checkbox"/> S7	Standard 7: Industry and Community Relations	<input checked="" type="checkbox"/> Full access	<input type="button" value="Set date"/>	Full access No date yet
<input type="checkbox"/> S8	Standard 8: Program Support and Resources	<input type="checkbox"/> Full access	<input type="button" value="Set date"/>	Not selected <input type="button" value="−"/>
<input type="checkbox"/> S9	Standard 9: Program Assessment	<input type="checkbox"/> Full access	<input type="button" value="Set date"/>	Not selected <input type="button" value="−"/>

4 selected items have no date. You can still save or use "Fill empty with...".

Figure 13: Assigning Full Access to Standards to Self-Assessor

Standard	Title	Access	Target date	Status
<input checked="" type="checkbox"/> S1	Standard 1: Regulatory Foundation	<input type="checkbox"/> Full access <input type="button" value="Done"/>	<input type="button" value="Set date"/>	Subsections: 3 No date yet

Select one or more subsections for this standard.

1a (Assessment of the Program's Regulatory Foundation)
 1b (Assessment of the Program's Regulatory Foundation)
 2a (Food Code Interventions and Risk Factors)
 3a (Good Retail Practices)
 4a (Compliance and Enforcement)
 1c (Assessment of the Program's Regulatory Foundation)

Figure 14: Assigning Partial Access of a Standard to Self-Assessor



Quick picks

[End of week](#)
[End of next week](#)

[End of month](#)
[End of next month](#)

[End of quarter](#)
[End of next quarter](#)

[+14 days](#)
[+30 days](#)

Specific date

📅
Clear
Done

Figure 15: Assign Date to Complete Self-Assessment

A summary of all assignments appears on the right-hand side of the **User Assignment** screen. The admin is not automatically listed on this screen as you will have full access to all 9 Standards by default. You can assign yourself specific Standards as the admin to track progress.

User Assignments All standards ▾

ES **Evan Suttell**
esuttell@neha.org Manage Remove

🛡️ **Full Access** 9

S1 S2 S3 S4 S5 S6 S7 S8 S9

🔗 **Subsection Access** 0
None

🔗 **Narrow Access** 0
None

TU **Test User**
eztraining@neha.org Manage Remove

🛡️ **Full Access** 3

S3 S6 S7

🔗 **Subsection Access** 3

S1 - 1a S1 - 1b S1 - 1c

🔗 **Narrow Access** 0
None

Figure 16: Summary of Assigned Standards to Self-Assessors



5. Step 2: SA9 Project Management

The **SA9 Project Management** step provides a detailed view of self-assessment progress across all 9 Standards. It shows completion status for assessment activities but does not indicate whether specific action items are “met.” If you do meet an entire Standard, the Standard will be highlighted in green and listed as “Met and Not Audited.” You can also view uploaded Evidence for each Standard as well as comments left by Assessors.

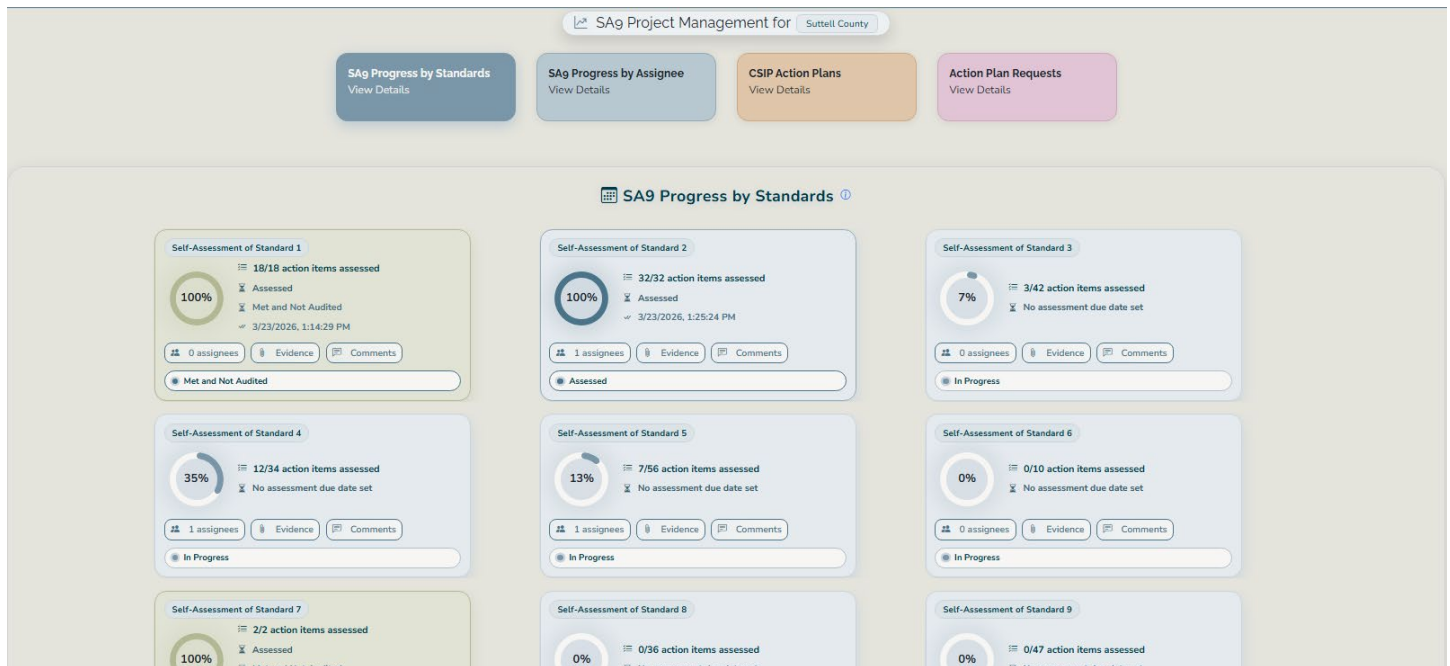


Figure 17: SA9 Progress by Standard

The **SA9 Progress by Standards dashboard** shows you the progress of the Self-Assessment on all 9 Standards. For Standards with a set Assessment due date, the system will tell you how many days until the due date/how many days overdue the Assessment is.

Assessors will work through action items associated with each non-met Standard subsection. If you do not know when or who can start working on an Action Item, you can click the *Not Planned* button when your Action Item status is set to *Not Started Yet* to record that you have not met the Action Item without needing to complete your CSIP. We highly recommend completing the CSIP fields as they will be required for final reports; if you do choose to check the *Not Planned* box, you will need to complete these fields later.

The **SA9 Progress by Assignee** dashboard allows you to see progress made on specific Standards by assignees. **PLEASE NOTE:** Admin progress does not show on this dashboard as you will have access to all Standards by default. The Admin will have to assign themselves specific Standards to appear on this dashboard.



Figure 18: SA9 Progress by Assignee

When all action items have been assessed (they do not need to be met), there will be a new **Mark Self-Assessment as Complete** box on the SA9 Project Management screen. Completing the Self-Assessment does not mean you have met the Standard, just that you have reviewed and assessed the status of all action items. If you do meet an entire Standard, the Standard will be highlighted in green and listed as “Met and Not Audited.”

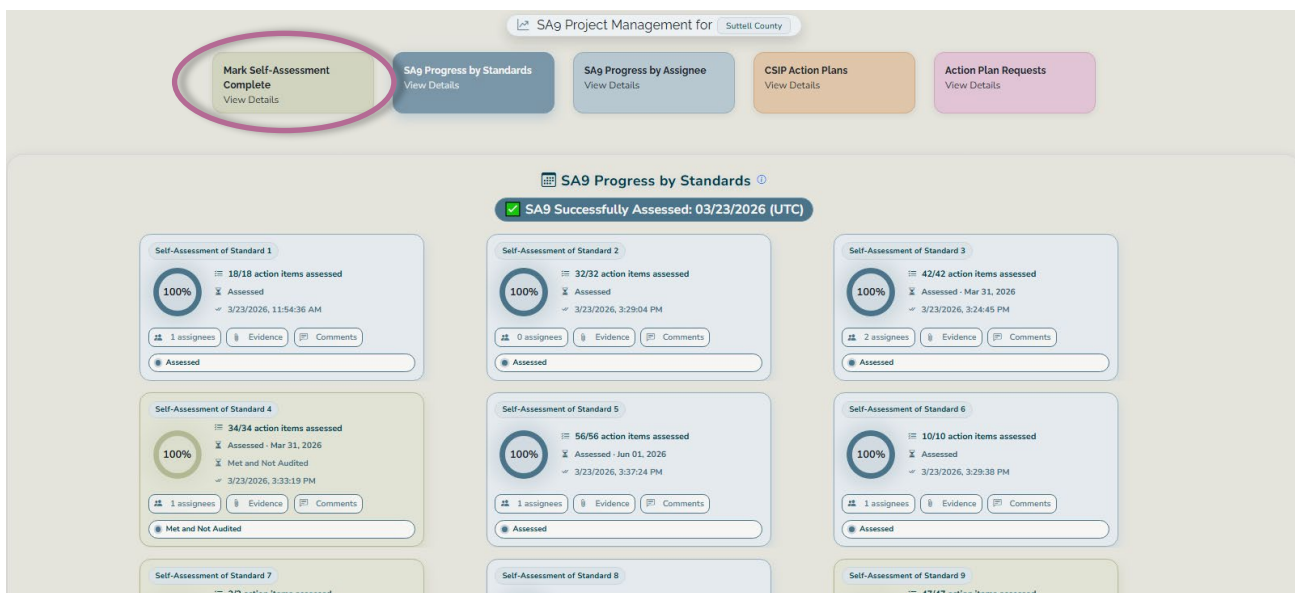


Figure 19: SA9 Project Management Screen when SA9 is Completed.

SAG Project Management for Suttell County

Mark Self Assessment Complete
View Details

SAG Progress by Standards
View Details

SAG Progress by Assignee
View Details

CSIP Action Plans
View Details

Action Plan Requests
View Details

✔ **Finalize Self Assessment for SAG**

ⓘ You are about to mark the SA9 Self Assessment as Fully Assessed. This means the following:

- All 9 standards have been fully assessed.
- After you confirm, you will NOT be able to return to Step 2.
- You'll gain access to Step 3: CSIP Overview and Step 4: CSIP Project Overview.
- All worker dashboards will now convert to CSIP Action Plan Portals.

📄 **FDA Form 3958** Required before finalizing

Upload FDA PDF
View Submissions

Ready to continue?

Cancel
Yes, my SA9 is fully assessed

Figure 20: Finalize SA9 and Submit Form 3958



Confirm SA9 is Fully Assessed ✕

Finalize Self Assessment (SA9) Final step

Are you sure you want to mark the Self Assessment as Fully Assessed?

⚠ Once finalized, SA9 is locked for editing. To reopen the Self Assessment phase, you'll need to contact the development team.

SA9 Form 3958 is on file

I understand and want to finalize SA9 now.

Figure 21: Finalize SA9

Once all Standards have been assessed, you can mark the Self-Assessment as complete, which unlocks access to the **CSIP Overview**. The Admin will be prompted to file FDA Form 3958 indicating completion of the SA9 at this stage. You will still be able to update SA9 progress after this initial completion.



6. Step 3 – CSIP Overview

The screenshot displays the 'Complete CSIP' view within the NEHA Admin Dashboard. The navigation bar at the top includes 'Admin Dashboard', 'Step 1: SA9/User Assignment', 'Step 2: SA9 Project Management', 'Step 3: CSIP Overview', and 'Step 4: CSIP Project Management'. The main content area features three buttons: 'Complete CSIP View Details', 'CSIP Planning Tool View Details', and 'Action Plan Requests View Details'. Below these is a table titled 'Complete CSIP' with the following data:

Action ID	Action	Deliverable	Start	End	Duration	Team Members	Status	Comments
B-4cA11	Assess staffing, budget, and equipment needed for Standard 3. Outline staffing...	Assessment of staffing, budget, and equipment needs	—	—	—	—	Completed	—
B-4dA11	Assess staffing, budget, and equipment needed for Standard 4. Outline staffing...	Assessment of staffing, budget, and equipment needs	—	—	—	—	Completed	—
B-4eA11	Assess staffing, budget, and equipment needed for Standard 5. Outline staffing...	Assessment of staffing, budget, and equipment needs	—	—	—	—	Completed	—
B-4fA11	Assess staffing, budget, and equipment needed for Standard 6. Outline staffing...	Assessment of staffing, budget, and equipment needs	—	—	—	—	Completed	—
B-4gA11	Assess staffing, budget, and equipment needed for Standard 7. Outline staffing...	Assessment of staffing, budget, and equipment needs	—	—	—	—	Completed	—
B-4hA11	Assess staffing, budget, and equipment needed for Standard 2. Outline staffing...	Assessment of staffing, budget, and equipment needs	—	—	—	—	Completed	—
B-4aA11	Assess staffing, budget, and equipment needed for Standard 1. Outline staffing...	Assessment of staffing, budget, and equipment needs	—	—	—	—	Completed	—
B-3bA11	Assess the data collection, analysis, and reporting systems to see if they meet the...	—	—	—	—	—	Completed	—
B-2bA14	Determine the cost to maintain these supplies and add to budget, include...	Budget	—	—	—	—	Completed	—
B-2bA13	Develop written procedures outlining how to obtain items that cannot be purchased...	Equipment Request Procedures	—	—	—	—	Completed	—

Figure 22: Complete CSIP View

After marking the SA9 as complete, you can view all CSIP Action Items in one place with the **Complete CSIP** view in the Step 3: CSIP Overview. This section allows you to export data to Excel or PDF. You can edit your Action Items here to ensure that all of them have the required submission criteria filled out for non-completed Action Items (Start Date, Team Members, and Status).

The **CSIP Planning Tool** view will allow you to break down action items by Standard, subsection, completion status, and grant year in which you plan to work on the item. The **NEHA-FDA RFFM Planning Tool** is meant to help you plan your work for the next two years of the RFFM Grant Cycle. You can export each year of the Planning Tool as a PDF workplan.



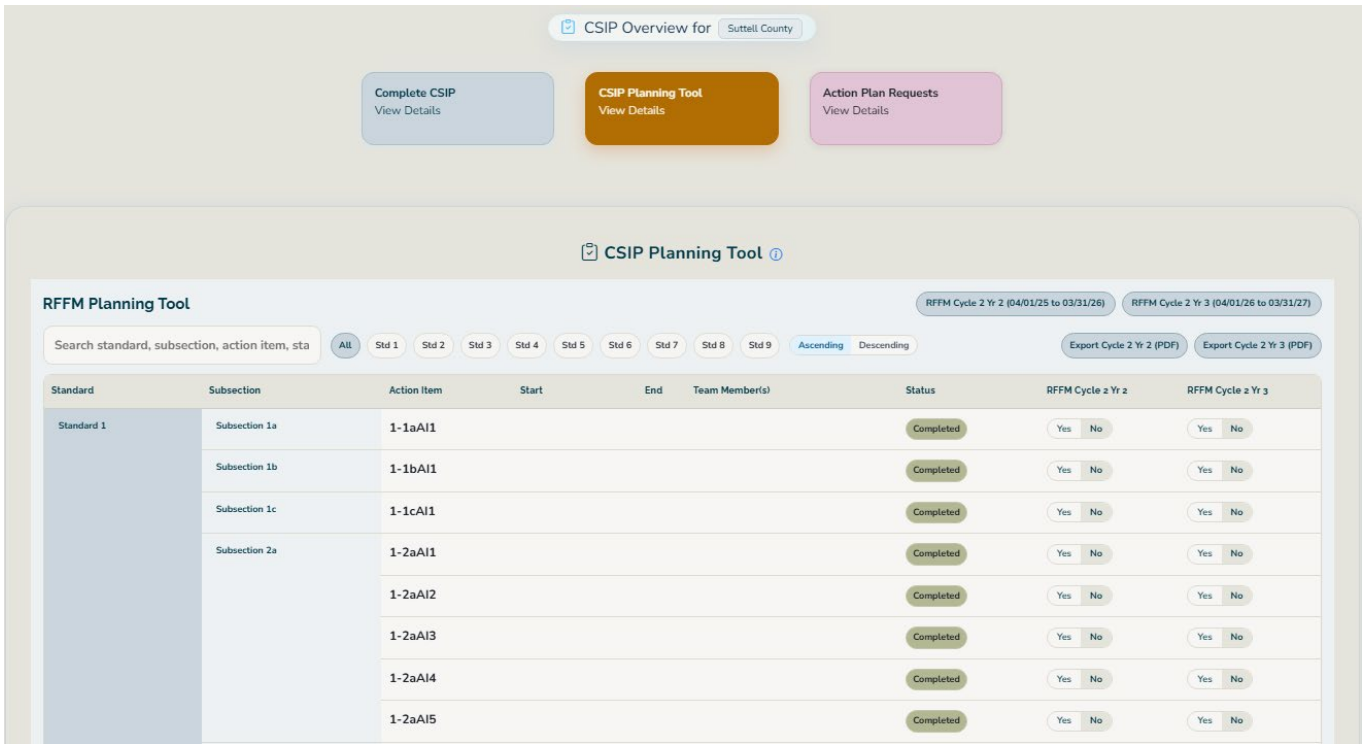


Figure 23: CSIP Planning Tool

7. Step 4: CSIP Project Management

The CSIP Project Management view provides a high-level overview of all completed and ongoing action items.



Figure 24: CSIP Progress By Standard

Having completed all elements of a Standard will allow you to download FDA Form 3958 to submit to your FDA Retail Food Specialist. You can also submit documentation for met Standards to external auditors for a Verification Audit.

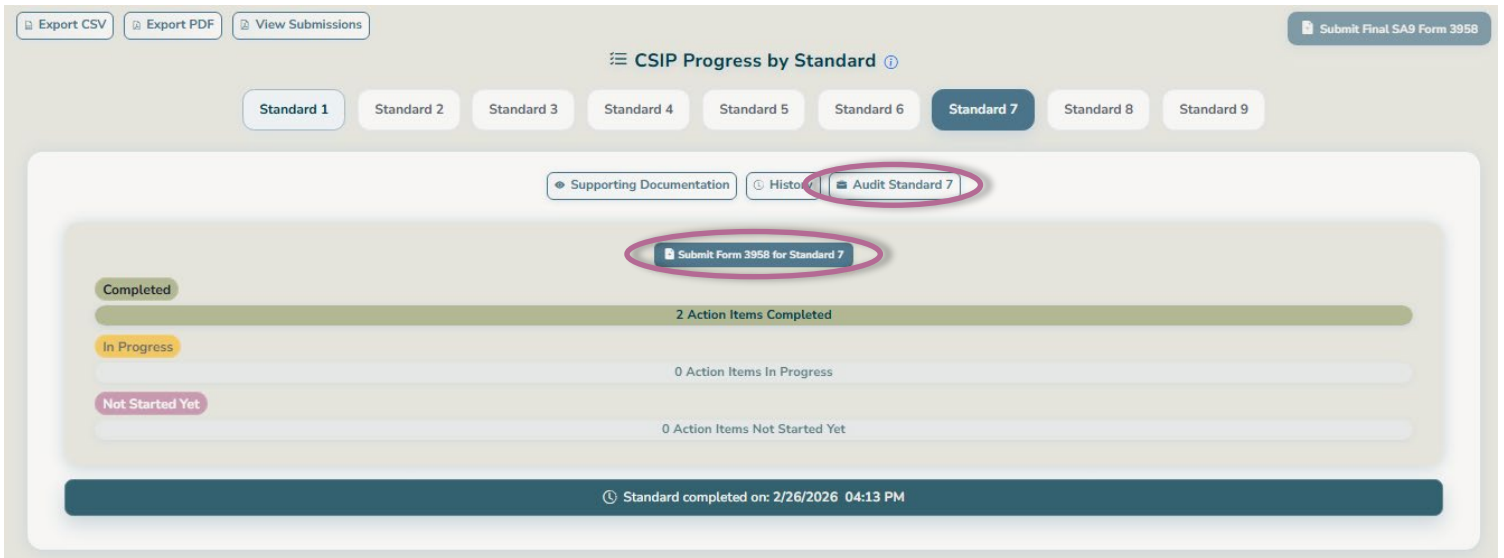


Figure 25: Completed Standard with Option to Submit Form 3958

The **CSIP Progress by Assignee** tab allows you to see the completion status of Action Items assigned to your staff members.

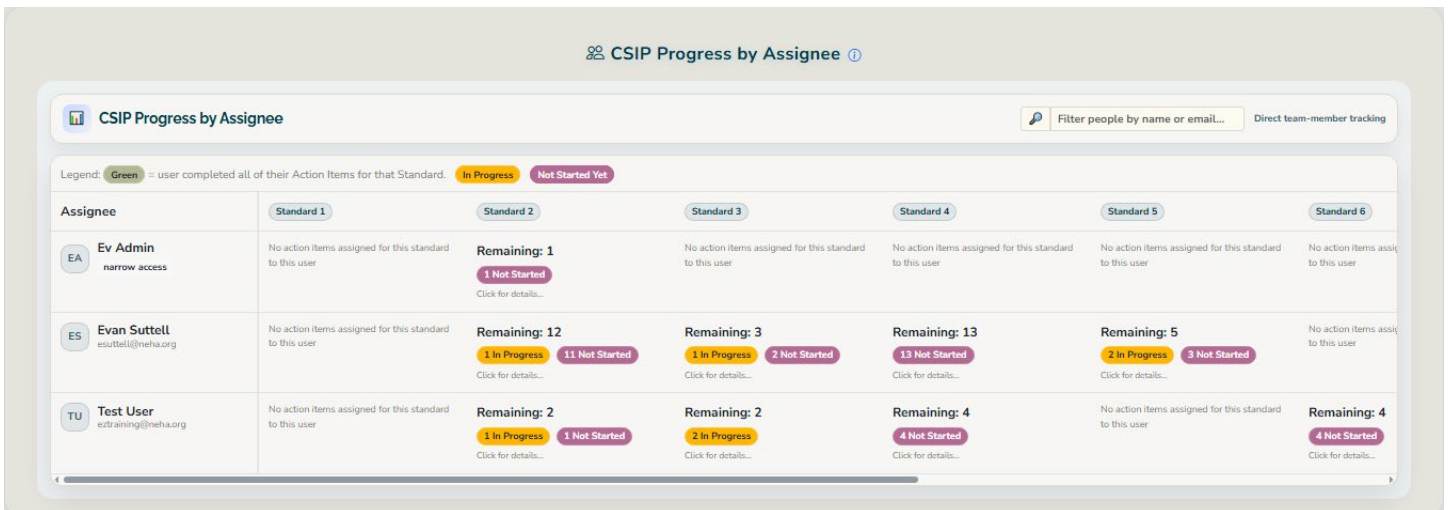


Figure 26: CSIP Progress by Assignee

Process Overview - Assessor

1. Accessing Assessor View – Admin Accounts

Administrators can switch to the Self-Assessor workspace using the profile icon in the top-right corner and selecting “Switch Workspace.” Clicking *Switch Workspace* will allow you to view/edit the SA9/CSIP as a Self-Assessor.

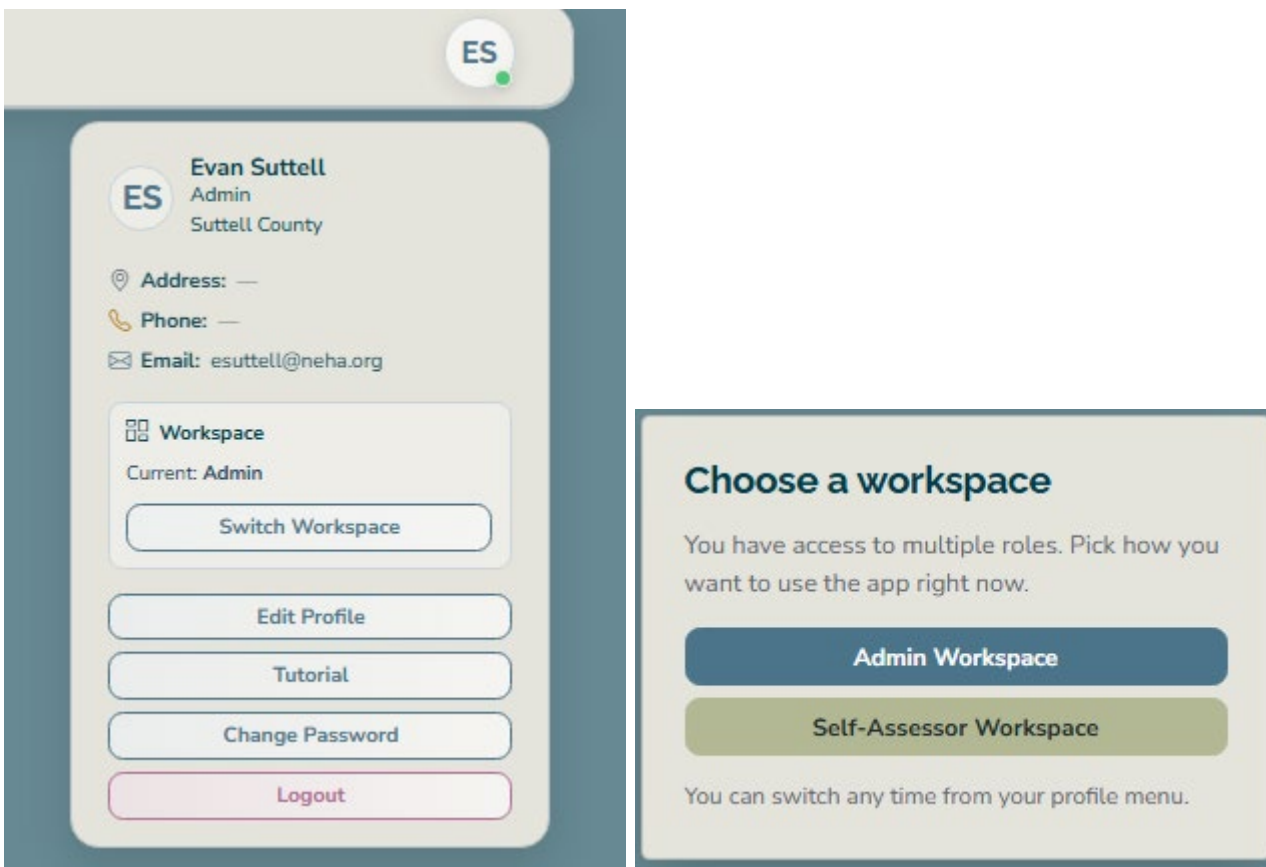


Figure 27: Admin Switch Workspace

As an admin, you will have full access to all SA9/CSIP records that you have created.



2. Accessing Assessor View – Assessor Accounts

Assessors, upon accepting an invitation, will set up their password and be taken directly to the SA9 selection screen. They will only have access to the SA9/CSIP records and Standards on those records assigned to them by the admin. The figure below shows a Self-Assessor who has been assigned to multiple SA9 records with different levels of Standards access.

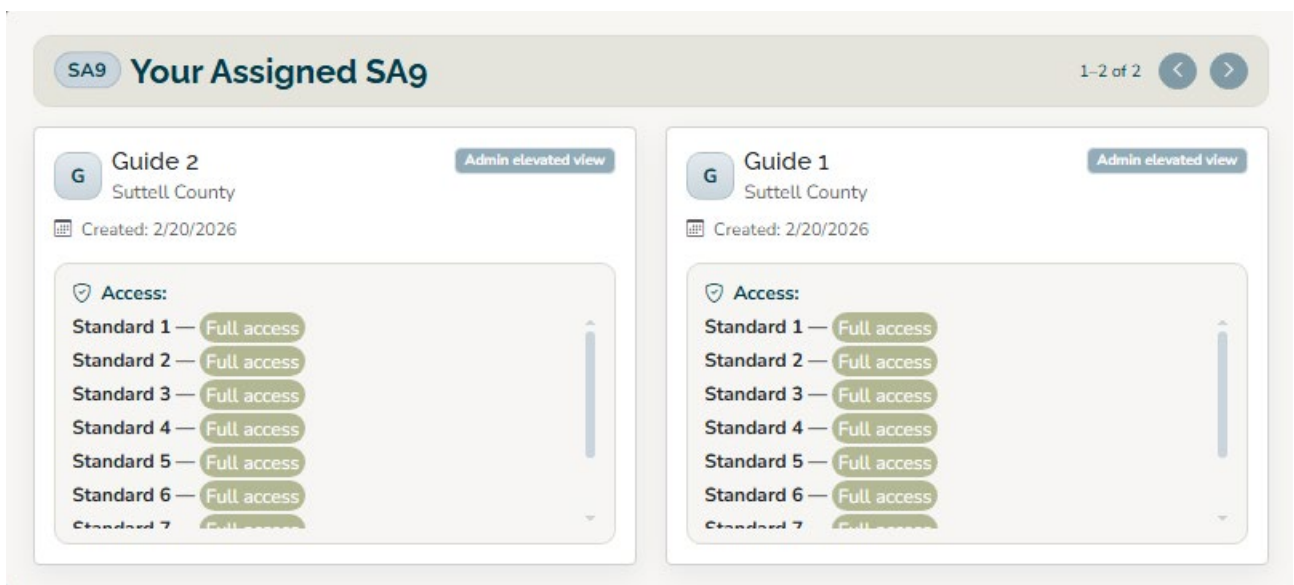


Figure 28: Assessor Assigned SA9 Selection



3. Editing SA9/CSIP

The screenshot displays the SAVA Gap Analysis Tool interface. On the left, the 'SAVA Gap Analysis Tool' sidebar shows 'Self Assessment of All 9 Standards' with a progress indicator for 'Standard 1: Regulatory Foundation' at 100%. The main area is titled 'CSIP Comprehensive Strategic Improvement Plan' and contains a table of action items. The table has columns for Standard #, Action, Deliverable, Start, End, Duration, Team Members, Status, and Comments. All listed action items are marked as 'Completed'.

Standard #	Action	Deliverable	Start	End	Duration	Team Members	Status	Comments
1-1aA1	Complete side-by-side co...	SLT's statute, regulation...	---	---	---	---	Completed	---
1-1bA1	Include the assessment of...	SLT's statute, regulation...	---	---	---	---	Completed	---
1-1cA1	Cross-reference local/stat...	SLT's statute, regulation...	---	---	---	---	Completed	---
1-2aA1	Assess if rule/statute has L...	Documentation showing a...	---	---	---	---	Completed	---
1-2aA2	Draft language to update ...	Rule/Statute draft langua...	---	---	---	---	Completed	---
1-2aA3	Conduct a meeting with le...	---	---	---	---	---	Completed	---
1-2aA4	Revise language based on...	Revised rule/statute langu...	---	---	---	---	Completed	---
1-2aA5	Implement rule change pr...	Final rule/statute	---	---	---	---	Completed	---
1-3aA1	Assess if rule/statute has ...	---	---	---	---	---	Completed	---
1-3aA2	Draft language for each G...	Rule/Statute Draft Langua...	---	---	---	---	Completed	---
1-3aA3	Conduct a meeting with le...	---	---	---	---	---	Completed	---
1-3aA4	Revise language based on...	Revised rule/statute langu...	---	---	---	---	Completed	---
1-3aA5	Implement rule change pr...	Final rule/statute	---	---	---	---	Completed	---
1-4aA1	Assess if rule/statute cont...	Documentation showing a...	---	---	---	---	Completed	---
1-4aA2	Draft language for each C...	Rule/Statute Draft Langua...	---	---	---	---	Completed	---
1-4aA3	Conduct a meeting with le...	---	---	---	---	---	Completed	---

Figure 29: SA9 and CSIP View for Assessors

The RSA Tool integrates both the SA9 and CSIP, allowing assessors to complete their Self-Assessment and improvement plans in one place.

In the SA9 section, assessors indicate whether each Standard subsection is met or not. If the subsection is met, corresponding CSIP action items automatically mark as completed. You will also be able to add evidence in the form of a link or file if you do indicate you met a Standard subsection.



Subsection 1a

Subsection Description

The jurisdiction maintains a written training record for each employee that includes the date of hire or assignment to the agency's retail food protection program.

This subsection has 7 action items.

Self Assessment Met? Yes

Self-Assessor's Comments Enter your comments here...

Verification Audit Met

If No, why criterion not met

View History Edit Action Plan Supporting Documentation Save & Close

Figure 30: Marking Standard Element as Met

In the SA9 section, assessors indicate whether each Standard subsection is met or not. If the subsection is met, corresponding CSIP action items automatically mark as completed. You will also be able to add *Supporting Documentation* in the form of a link or file to all Standard sub-sections.



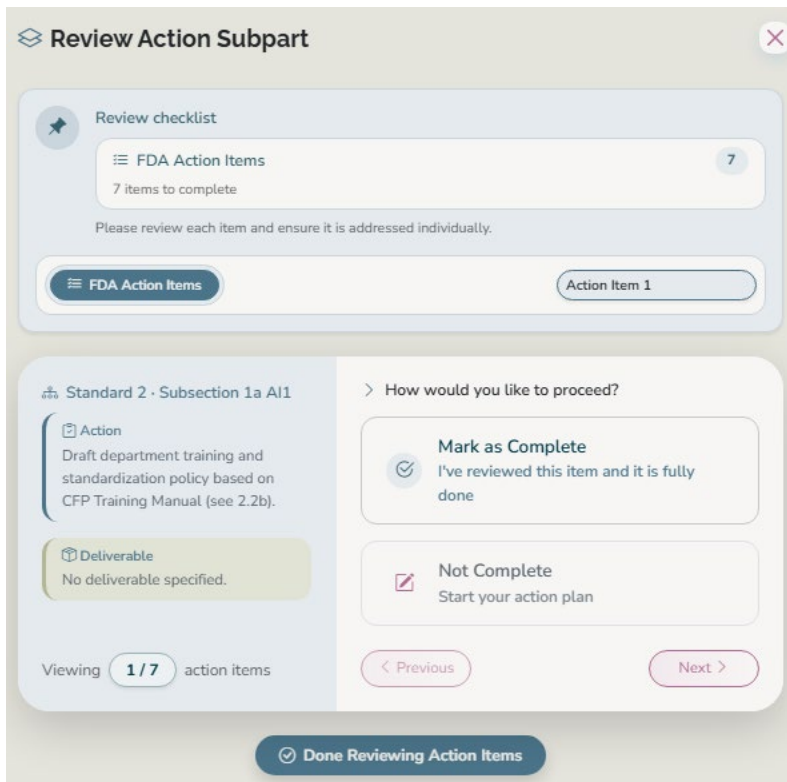


Figure 31: Completing Action Items for Non-Met Subsections

If the subsection is not met, a window prompts the assessor to complete or update related CSIP action items, including timelines, team members, and progress status. If you click **Not Complete**, you will be redirected to another window where you complete the CSIP action plan for that action item. You can also mark specific action items as Complete even if you have not met the Standard element fully.

The requirements for the CSIP have not changed: all non-completed action items will require a target date, at least one team member, and a completion status (either “Not Started Yet” or “In Progress”).



Action Plan

Recommended Action
Draft department training and standardization policy based on CFP Training Manual (see 2.2b).

Deliverable
No deliverable specified.

Required to Save: **Start Date** **Team Members** **Status**

Start Date **End Date** **Duration**

mm/dd/yyyy mm/dd/yyyy e.g., "2 weeks"

Team Members
Type a name or email...

Status **Additional Comments**

-- Select -- Add comments...

Save & Close

Figure 32: CSIP Action Plan for Not Complete Action Items

PLEASE NOTE: for the purpose of completing your Self-Assessment in Step 2 in a timely fashion, selecting the *Not Planned* box when your status is *Not Started Yet* will remove the requirements to add a Start Date and Team Members. If you choose not to fill these fields, you will need to go back later to add these fields for NEHA to accept your CSIP as complete.



Action Plan

Recommended Action
Draft department training and standardization policy based on CFP Training Manual (see 2.2b).

Deliverable
No deliverable specified.

Required to Save: Start Date (bypassed) Team Members (bypassed) Status

Start Date **End Date** **Duration**

Team Members

Status
 Not Started Yet
 Not Planned ⓘ

Additional Comments

Save & Close

Figure 33: "Not Planned" Box To Bypass Requirements

This *Not Planned* box was created so jurisdictions looking to complete their full self-assessment before completing their CSIP are not forced to create action plans for all action items before their Self-Assessment was finished.

The date function will allow you to select dates up to 5 years in the future to fit with the 5-year Self-Assessment period. The status of the Action Item will change based on the start date entered (such as if the date is before today's date, the status will automatically be set to "In Progress").



Action Plan [Close]

Recommended Action
Draft department training and standardization policy based on CFP Training Manual (see 2.2b).

Deliverable
No deliverable specified.

Required to Save: Start Date Team Members Status

Start Date: 03/20/2026 [Calendar Icon]

End Date: mm/dd/yyyy [Calendar Icon]

Duration: e.g., "2 weeks"

March 2026 [Up] [Down]

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Clear Today

Additional Comments
Add comments...

Figure 34: Date Function

Add team members to a task using their email address. When adding team members to a task, you can either add users who already have been granted access to the system by the admin, or you can invite users not in the system. If listing an email that has not been invited to the system, an administrator must approve the invitation. You can add multiple team members to any action item.



⚡ Action Plan ✕

Recommended Action
Assess available IT systems for tracking and maintaining staff training and standardization records.

Deliverable
IT System or Tracking Method

Required to Save: Start Date 1 Team Members Status

Start Date: mm/dd/yyyy

End Date: mm/dd/yyyy

Duration: e.g., "2 weeks"

Team Members 1

Test User
eztraining@neha.org

Not Started Yet Add comments...

Not Planned ?

Save & Close

Figure 35: Adding a User who has already been invited by the admin



Action Plan ✕

Recommended Action: Finalize the training and standardization policy

Deliverable: Field Training Manual

Required to Save: Start Date Team Members Status

Start Date: 06/01/2026 📅 End Date: mm/dd/yyyy 📅 Duration: e.g., "2 weeks"

Team Members 1

esuttelladmin@neha.org

Invite esuttelladmin@neha.org

Status: Not Started Yet 📄 Add comments...

Not Planned ?

📄 Save & Close

Start Date: 06/01/2026 📅 End Date: mm/dd/yyyy 📅 Duration: e.g., "2 weeks"

Team Members

esuttelladmin@neha.org ✕ Type a name or email...

⌘ Helper access status (pending admin approval)
📧 esuttelladmin@neha.org
 Invites show as pending until an admin approves.

Status: Not Started Yet 📄 Additional Comments: Add comments...

Not Planned ?

Add names for invited helpers (optional but recommended)

Team Member — esuttelladmin@neha.org

First name: Last name:

📄 Save

We'll notify your admin for approval. If they already have an account, these names are ignored.

📄 Save & Close

Figure 36: Adding users not invited to the system



While working on the SA9, Assessors will be able to see the percentage of the Standard assessed. This is **not** a measure of how much of the Standard is met, but simply if you have completed the self-assessment for each Standard. In this view, Standard elements that have been assessed will become green.

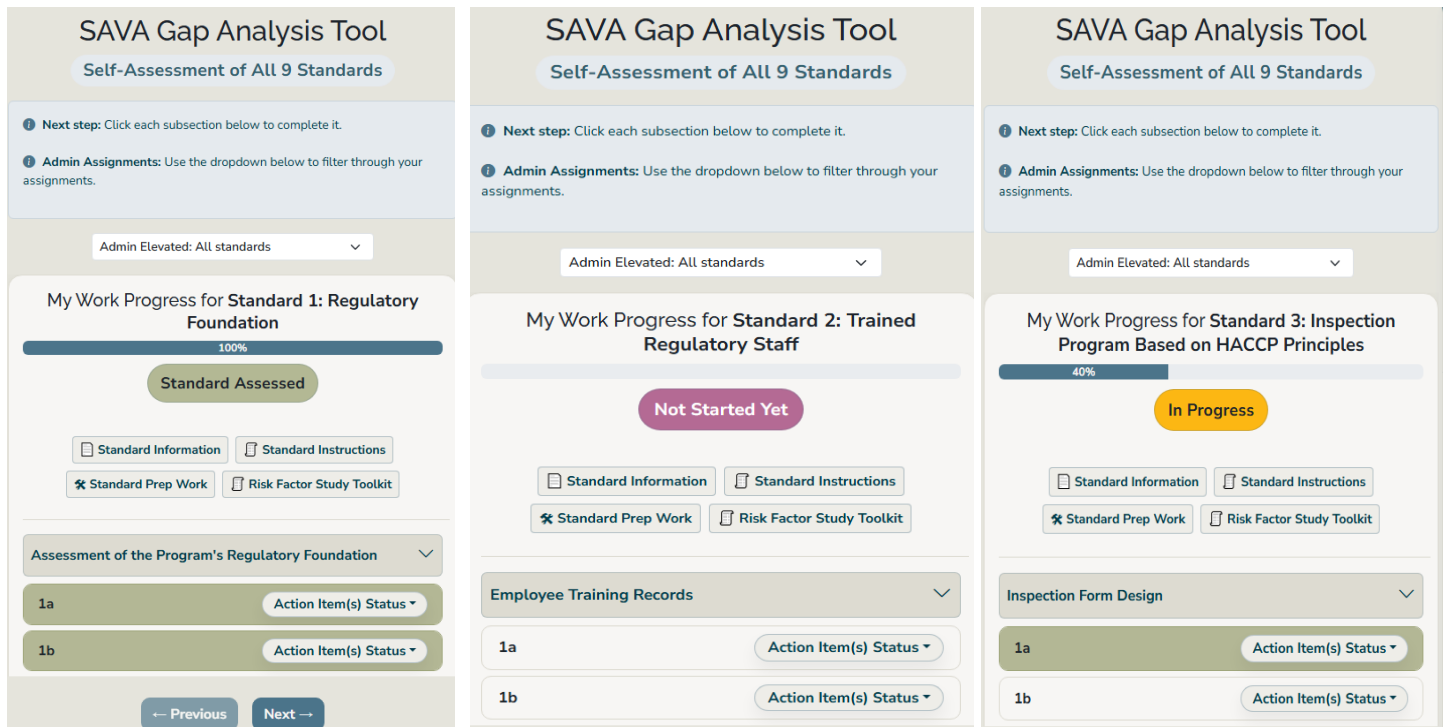


Figure 37: SA9 Assessment Completion Percentages for 1.) Fully-Assessed Standard, 2.) Standard that has no Assessment progress, and 3.) Partially-Assessed Standard

After **Step 2 (Self-Assessment)** is completed by the Admin, the Standard progress percentages will change from the percentage of Self-Assessment completed (i.e. percentage of Action Items assessed) to the percentage of Action Items **met**.

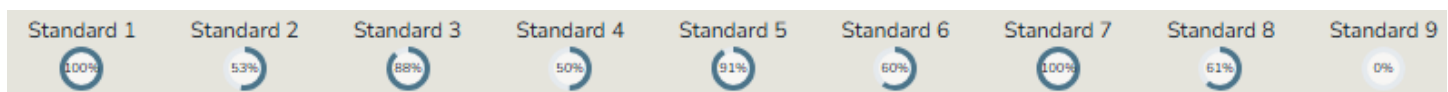


Figure 38: Completion by Standard on Top Bar

The language in the **My Work Progress** box in the Self-Assessor View will change after the Admin finalizes the SA9 in Step 2. In this Post-SA9 view, only Standard elements that you fully meet will be highlighted in Green.

SAVA Gap Analysis Tool

CSIP Action Plan (Post SA9)

Next step: Click each subsection below to complete it.

Admin Assignments: Use the dropdown below to filter through your assignments.

Admin Elevated: All standards ▾

My Work Progress for Standard 1: Regulatory Foundation

100%

Standard Met

Standard Information

Standard Instructions

✦ Standard Prep Work

Assessment of the Program's Regulatory Foundation ▾

1a
Action Item(s) Status ▾

1b
Action Item(s) Status ▾

SAVA Gap Analysis Tool

CSIP Action Plan (Post SA9)

Next step: Click each subsection below to complete it.

Admin Assignments: Use the dropdown below to filter through your assignments.

Admin Elevated: All standards ▾

My Work Progress for Standard 2: Trained Regulatory Staff

53%

In Progress

Standard Information

Standard Instructions

✦ Standard Prep Work

Employee Training Records ▾

1a
Action Item(s) Status ▾

1b
Action Item(s) Status ▾

Figure 39: Post-SA9 CSIP Progress on Met and Partially-Achieved Standards



The CSIP section on the right-side will allow you to sort by Standard and completion status.

CSIP									
Comprehensive Strategic Improvement Plan									
<small>Purpose: Action Plans will auto-populate here as you add them! Click on a row to edit.</small>									
Search...								Status: All	Standards: All
Standard ▲	Action	Deliverable	Start	End	Duration	Team Members	Status	Comments	
1-1aA11	Complete side-by-side co...	SLTT's statute, regulation...	—	—	—	—	Completed	—	
1-1bA11	Include the assessment of...	SLTT's statute, regulation...	—	—	—	—	Completed	—	
1-1cA11	Cross-reference local/stat...	SLTT's statute, regulation...	—	—	—	—	Completed	—	
1-2aA11	Assess if rule/statute has t...	Documentation showing a...	—	—	—	—	Completed	—	
1-2aA12	Draft language to update ...	Rule/Statute draft langua...	—	—	—	—	Completed	—	
1-2aA13	Conduct a meeting with le...	—	—	—	—	—	Completed	—	
1-2aA14	Revise language based on...	Revised rule/statute langu...	—	—	—	—	Completed	—	
1-2aA15	Implement rule change pr...	Final rule/statute	—	—	—	—	Completed	—	
1-3aA11	Assess if rule/statute has ...	—	—	—	—	—	Completed	—	
1-3aA12	Draft language for each G...	Rule/Statute Draft Langua...	—	—	—	—	Completed	—	
1-3aA13	Conduct a meeting with le...	—	—	—	—	—	Completed	—	
1-3aA14	Revise language based on...	Revised rule/statute langu...	—	—	—	—	Completed	—	
1-3aA15	Implement rule change pr...	Final rule/statute	—	—	—	—	Completed	—	
1-4aA11	Assess if rule/statute cont...	Documentation showing a...	—	—	—	—	Completed	—	
1-4aA12	Draft language for each C...	Rule/Statute Draft Langua...	—	—	—	—	Completed	—	
1-4aA13	Conduct a meeting with le...	—	—	—	—	—	Completed	—	

Figure 40: CSIP

The three buttons at the bottom of the CSIP will allow you to **Export to CSV**, **Export to PDF**, or **Open Full Page**.

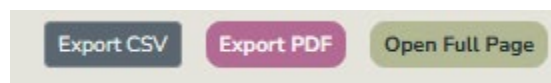


Figure 41: Export CSIP



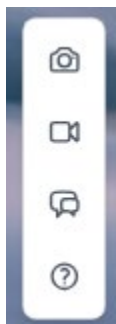
Full page view:

CSIP Comprehensive Strategic Improvement Plan									
Purpose: Action Plans will auto-populate here as you add them! Click on a row to edit.									
Search...									
Standard	Action	Deliverable	Start	End	Duration	Team Members	Status	Comments	
1-1aA1	Complete side-by-side comparison of rules and statutes against current FDA code or one of the two most recent versions. Ensure elements from 1.1.b and 1.1.c are included.	SLTT's statute, regulation, ordinance or rule. Regulatory Foundation Assessment document such as the "Regulatory Foundation Self-Assessment Worksheets"	---	---	---	---	Completed	---	
1-1bA1	Include the assessment of Food Code Interventions and Risk Factors, Good Retail Practices, and Compliance and Enforcement in side-by-side comparison	SLTT's statute, regulation, ordinance or rule. Regulatory Foundation Assessment document such as the "Regulatory Foundation Self-Assessment Worksheets"	---	---	---	---	Completed	---	
1-1cA1	Cross-reference local/state rules/statute sections with Food Code provisions. Provide code references.	SLTT's statute, regulation, ordinance or rule. Regulatory Foundation Assessment document such as the "Regulatory Foundation Self-Assessment Worksheets"	---	---	---	---	Completed	---	
1-2aA1	Assess if rule/statute has the required number of Risk Factor and Interventions from the Food Code. If not, proceed with A12 below.	Documentation showing adequate number of Risk Factor and Intervention sections met.	---	---	---	---	Completed	---	
1-2aA2	Draft language to update or add Risk Factor and Intervention items missing from state/local code. Provide public health reason for the proposed change.	Rule/Statute draft language with public health reasons support document	---	---	---	---	Completed	---	
1-2aA3	Conduct a meeting with leadership explaining proposed revisions and the public health reasons.	---	---	---	---	---	Completed	---	
1-2aA4	Revise language based on leadership input.	Revised rule/statute language	---	---	---	---	Completed	---	

Figure 42: CSIP Full Page View

Technical Feedback

If you run into any technical issues, we have added a feedback snapshot tool for you to screenshot and screen record any problem you see.



Use this bar on the right side of your screen. You will be able to take screenshots, screen recordings, and view all feedback with this bar.



Thank you!

You have finished reading our tutorial guide to the Retail Standards Assessment Tool. Please reach out to me at rsatool@neha.org if you have any questions or concerns about the guide or tool. We would appreciate your feedback on how this guide could be improved

