



ADJUDICATOR CASE WORKSHEET REVIEW

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Purpose: Orient the user to the Adjudicator Case Worksheet.

CASE WORKSHEET REVIEW: ADJUDICATION & APPEALS

The **Case Processor** role allows users to open a case and view the information banners, the Profile, Subject History, Notes, Attachments tabs, and action cards. The Case Processor role paired with the **Adjudicator** or **Appeals Processor** role will allow users to view the Guidelines and Review tabs. When a user opens an assigned case in Task Management in either the Adjudication or Appeals phase, they will see the Case Worksheet view and some actions available for the specific phase.

How to Navigate to the Adjudicator’s Case Worksheet

1. Select **Task Management** from the left navigation. The default tab will be the **My Work** tab.
2. Select the **Task ID** link to open the desired case.

Task ID	Case Type	Status	Task Age (days)	Urgency	Task Assignment Date	Last Name	Priority
21013BFAN1230151	Tier 1	OGC Review	414	10	2/3/22	Bean	---
20358NOTE1409271	Tier 5	OGC Review	435	10	2/3/22	Note	---
21007OATM0820234	Tier 3	OGC Review	420	10	2/3/22	Oatmeal	---
20364BUNN1421001	Tier 3	OGC Review	429	10	2/3/22	Bunny	---
20364SOC11427137	Tier 3	TECT Review	429	10	2/3/22	Society	---
20349COUT1626578	Tier 3 Reinvestigation	TECT Review	443	10	2/3/22	Couture	---
20357BIDE0641167	Tier 5	TECT Review	436	10	2/3/22	Biden	---
21005BUTT1206451	Tier 3	OGC Review	422	10	2/3/22	Button	---
20357BAHA0859546	Tier 5 Reinvestigation	TECT Review	436	10	2/3/22	Bahama	---
20357GIBS0831148	Tier 3	TECT Review	436	10	2/3/22	Gibson	---
22062HARE1001072	Tier 5	Received	0	10	3/3/22	Hare	---

Elements of the Case Worksheet:

- A. Subject Banner – Includes high level information about the subject and the Actions drop-down
- B. Case Banner – Includes the case type, phase, date of last phase update, external status, date of last status update, case ID, case owner, who the case is assigned to, and date the case was assigned
- C. Central Worksheet – tabs for Profile, Subject History, Attachments, Notes, and Guidelines
- D. Case Actions – Actions configured to the appropriate user roles and phase of the case
- E. Add Notes – Users can add notes to the Notes tab
- F. Upload Attachments – Drag attachments to upload to the Attachments tab

The screenshot displays the National Background Investigation Services Case Worksheet for subject Hare, March NMN. The interface includes a sidebar with navigation options: Task Management, Subject Management, and Org Management. The main content area is divided into several sections:

- Subject Banner (A):** Displays subject information including Name (Hare, March NMN), Program Tags, Citizenship (United States), Place of Birth (Temple, Texas), Date of Birth (01/01/1973), Aliases (N/A), and Contact Info (View).
- Case Banner (B):** Displays case details including Tier (Tier 5), Phase (ADJUDICATION), Status (RECEIVED), Case ID (22062HARE1001072), Case Owner, Assigned To, and Assigned On (03/03/2022).
- Central Worksheet (C):** Features tabs for Profile, Subject History, Attachments, Notes, and Guidelines. The Guidelines tab is active, showing Adjudication Guidelines with categories: National Security, Suitability/Fitness, HSPD-12 Credentialing, and Summary. A list of Guidelines (A-I) is provided, each with a 'See more' link.
- Case Actions (D):** Includes a 'Choose an Action' dropdown menu and a 'Continue' button.
- Add Notes (E):** Includes a 'Title' field, an 'Enter Notes...' text area, and an 'Add' button.
- Upload Attachments (F):** A section for uploading attachments.

