

## MANUALLY RECORD AN INVESTIGATION & DETERMINATION

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### MANUALLY RECORD AN INVESTIGATION & DETERMINATION

HOW TO MANUALLY RECORD AN INVESTIGATION ON A SUBJECT'S PROFILE.....

# Purpose: To demonstrate how to manually record an investigation on a subject's profile.

#### MANUALLY RECORD AN INVESTIGATION & DETERMINATION

How to Manually Record an Investigation on a Subject's Profile

- 1. From the Left Navigation Menu, select Task Management.
- 2. Select the Case ID hyperlink from the Task ID column.

**Note:** Record Investigation & Determination can be done either within the context of a case, or within the subject worksheet/profile.

| National Background Inv | estigation Services         |                                    |                   |                         |           |                      | Sea         | rch Subject by SSN | Q @ 🕫 👩      |
|-------------------------|-----------------------------|------------------------------------|-------------------|-------------------------|-----------|----------------------|-------------|--------------------|--------------|
| ② Dashboard             | Task Management             |                                    |                   |                         |           |                      |             |                    | Actions 🗸    |
| Task Management         |                             |                                    |                   |                         |           |                      |             |                    |              |
| Visit Management        | My Work My Outstanding Work | My Team's Work My Organization's V | /ork My Organiza  | tion's Outstanding Work | History   |                      |             |                    |              |
| Subject Management      | My Work                     |                                    |                   |                         |           |                      |             |                    |              |
| 人 Org Management        | Search My Work Q            |                                    |                   |                         |           |                      |             |                    |              |
| d. Demostr              |                             |                                    |                   |                         |           |                      |             | Table Settings ~   | Table View ~ |
| ill Reports             | Task ID                     | Case Type 👳                        | Status 🕎          | Task Age (days) 🕎       | Urgency 👳 | Task Assignment Date | 🕎 Last Name | <u>₹</u> Priority  | Ŧ            |
| Error Management        | 21162BAIL1619055            | Eligability Upgrade Request        | OGC Review        | 261                     | 10        | 2/2/22               | BaileyM     |                    |              |
|                         | 21334GREE1232549            | Incident Report                    | OGC Review        | 89                      | 10        | 2/2/22               | Greene      |                    |              |
|                         | 21334GELL1221133            | Incident Report                    | OGC Review        | 89                      | 10        | 2/2/22               | Geller      |                    |              |
|                         | 20357MADD0630563            | Tier 5 Reinvestigation             | OGC Review        | 433                     | 10        | 2/2/22               | Madden      |                    |              |
|                         | 21091DAHM1544137            | Incident Report                    | OGC Review        | 332                     | 10        | 2/2/22               | Dahmer      |                    |              |
|                         | 22039CHEE1051129            | Tier 3                             | Received          | 19                      | 10        | 2/8/22               | Cheeks      |                    |              |
|                         | 22038CHEE0924187            | Tier 5                             | Awaiting Eval AOR | 21                      | 10        | 2/9/22               | Cheeks      |                    |              |
|                         | 22056CHAN1052044            | Tier 5                             | Received          | 2                       | 10        | 2/25/22              | Chandler    |                    |              |
|                         |                             |                                    |                   |                         |           |                      |             |                    |              |
|                         | 1 m                         |                                    |                   |                         |           |                      |             |                    |              |
|                         |                             |                                    |                   |                         |           |                      |             |                    |              |
|                         |                             |                                    |                   |                         |           |                      |             |                    |              |
|                         |                             |                                    |                   |                         |           |                      |             |                    |              |

- 3. Select the Actions drop-down from the Case Worksheet.
- 4. Select Record Investigation.

| National Background Inve                               | estigation Services                       |                       |   |                          |            | Sea                        | arch Subject by SSN 🔍 💿 📌 📵                                      |
|--|---|-----------------------|---|--------------------------|------------|----------------------------|--|
| <ul> <li>Dashboard</li> <li>Task Management</li> </ul> | Chandler, Ethan La                        | wrence                | Program Tags:<br>Place of Birth: Jackson, Wyoming | Date of Birth:           | 08/01/1980 | Aliases: N/A               | Actions ~<br>Record Investigation                                |
| 🔄 Visit Management                                     | Profile Subject History                   | Attachments           | ,   |                          |            | and a second               | Create Case<br>Create Request                                    |
| Subject Management                                     | Subject Profile                           |                       |   |                          |            | Add Notes                  | Start Initiation   |
| ul Reports   | See All ~                                 |                       |   |                          |            | Enter Title                |  |
| <ol> <li>Error Management</li> </ol>                   | Open Cases<br>Case ID<br>22056CHAN1052044 | Phase<br>Adjudication | Case Type<br>Tier 5                               | Start Date<br>02/25/2022 | Expand All | Notes<br>Enter Notes       | bbA  |
|  | Case ID<br>22056CHAN1111105               | Phase<br>Adjudication | Case Type<br>Quality Assurance                    | Start Date<br>02/25/2022 | See more   | Upload Attachments         |  |
|  | Case ID<br>21335CHAN1053595               | Phase<br>Adjudication | Case Type<br>Tier 5                               | Start Date<br>12/01/2021 | See more   | Drag attachmei             | nt here  |
|  | Case ID<br>22056CHAN1120486               | Phase<br>Adjudication | Case Type<br>Incident Report                      | Start Date<br>02/25/2022 |            | PDF, TIF, TIFF, JPG, JPEG. | + <u>Select Attachments</u><br>DOC, DOCX and PNG file types only |

- 5. Complete the mandatory fields.
- 6. Select the **Include an Adjudication** checkbox if it is a prior investigation tied to an Adjudication case. Otherwise, the user is not required to select this checkbox and the **user can skip to step 10.**
- 7. Select Continue.

| National Background Inve | estigation Services        |   |   | s            | jearch Subject by SSN 🔍 💿 🖓 📵 |
|--------------------------|----------------------------|---|---|--------------|-------------------------------|
| Ø Dashboard              | Chandler, Ethan Lawrence   | Program Tags:   |   |              |                               |
| P Task Management        | Citizenship: United States | Place of Birth: Jackson, Wyoming                                    | Date of Birth: 08/01/1980                         | Aliases: N/A | Contact Info: View            |
| 📴 Visit Management       |                            |   |   |              |                               |
| Subject Management       | Record Investigation       | ad investigation data for Ethan Lawrence Chandler. Investigation da | ata is viewable within the subject's history tab. |              |                               |
| 人 Org Management         | NBIS Information           | u mruugunun uue en ener ener ener ener ener ene                     | A IS TRUTANG There are analysis a conserve y same |              |                               |
| II Reports               | Case Type*                 |   |   |              |                               |
| Error Management         | Select Case Type           | <u> </u>  |   |              |                               |
|                          | Investigation Data         |   |   |              |                               |
|                          | Organization *             | External Case ID*   |   |              |                               |
|                          | Enter Organization         | Enter External Case ID  |   |              |                               |
|                          | Start Date*                | End Date*   |   |              |                               |
|                          | mm/dd/yyyy                 | mm/dd/yyyy  | =   |              |                               |
|                          | Include an Adjudication    |   |   |              |                               |
|                          |                            |   |   |              |                               |
|                          |                            |   |   |              |                               |
|                          | Cancel                     |   |   |              | Continue                      |
|                          |                            |   |   |              |                               |

**Note:** Users should only select **Include an Adjudication** if recording historical adjudicative data. **Do not select it to take action on a current adjudication case.** The user is not required to include an adjudication at the same time an investigation is being recorded. Since they are stand-alone processes, they can be completed separately.

- 8. A green success banner will display.
- 9. Complete the required fields under Adjudication Data to add the Determination.

### 10. Select Submit.

| National Background Inve | estigation Services                                  |   |                           |              | Search Subject by SSN 🔍 💽 🖓 📵 |
|--------------------------|--|---|---------------------------|--------------|-------------------------------|
| Ø Dashboard              | Chandler, Ethan Lawrence                             | Program Tags:                             |                           |              |                               |
| Task Management          | Citizenship: United States                           | Place of Birth: Jackson, Wyoming          | Date of Birth: 08/01/1980 | Aliases: N/A | Contact Info: View            |
| Visit Management         |  | Success. New data has been added to Ethan | Lawrence Chandler.        |              | ×                             |
| Subject Management       | 22059CHAN0956595 - Tier 3                            |   |                           |              | <b>^</b>                      |
| 入 Org Management         | Adjudication Data                                    |   |                           |              |                               |
| III Reports              | Organization *                                       | External Case ID                          |                           |              |                               |
| From Management          | Department of Defense Consolidated Adjudications Fac | 6789                                      | J                         |              |                               |
| U Error Management       | Determination Type*                                  |   |                           |              |                               |
|                          | National Security ~                                  |   |                           |              |                               |
|                          | Determination Result                                 |   |                           |              |                               |
|                          |  |   |                           |              |                               |
|                          | Outcome*   |   |                           |              |                               |
|                          | Select Outcome 🗸                                     |   |                           |              |                               |
|                          | Adjudication Date*                                   |   |                           |              |                               |
|                          | mm/dd/yyyy   |   |                           |              |                               |
|                          |  | <u>.</u>                                  |                           |              |                               |
|                          |  |   |                           |              |                               |
|                          | Cancel Back  |   |                           |              | Submit                        |

- 11. A green success banner will display.
- 12. Select **Close** to return to the subject's worksheet.

| National Background Inve             | stigation Services   |   |                           |              | Search Subject by SSN 🔍 👩 🖉 🥑 |
|--------------------------------------|--|---|---------------------------|--------------|-------------------------------|
| Dashboard                            | Chandler, Ethan Lawrence   | Program Tags:   |                           |              |                               |
| P Task Management                    | chandler, Ethan Lawrence   |   |                           |              |                               |
|                                      | Citizenship: United States   | Place of Birth: Jackson, Wyoming  | Date of Birth: 08/01/1980 | Aliases: N/A | Contact Info: <u>View</u>     |
| Visit Management                     |  | Success. New data has been added to Ethi                                  | an Lawrence Chandler.     |              | ×                             |
| Subject Management                   |  |   |                           |              |                               |
| 🙏 Org Management                     | Record Adjudication<br>Complete the following required fields to record adjudication data for Ethan Lawrence | Chandler, Adjudication data is viewable within the subject's history tab. |                           |              |                               |
| ill Reports                          | NBIS Information   |   |                           |              |                               |
| <ol> <li>Error Management</li> </ol> | Case ID<br>22059CH4N0956595 - Tier 3   |   |                           |              |                               |
|                                      | Adjudication Data  |   |                           |              |                               |
|                                      | Organization<br>Department of Defense Consolidated Adjudications Facility                                    | External Case ID<br>6789  |                           |              |                               |
|                                      | Determination Type<br>National Security  |   |                           |              |                               |
|                                      | Determination Result<br>Favorable/Administrative   |   |                           |              |                               |
|                                      | Outcome<br>Grant   |   |                           |              |                               |
|                                      | Determination<br>Secret  | Type<br>Final   |                           |              |                               |
|                                      | Add Ons Child Care Eigible   |   |                           |              |                               |
|                                      | Adjudication Date<br>02/28/2022  |   |                           |              |                               |
|                                      |  |   |                           |              |                               |
|                                      |  |   |                           |              |                               |
|                                      |  |   |                           |              | Close                         |

