



ATTACHMENTS

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Purpose: To illustrate how to add and delete attachments to a subject's worksheet or case.

ATTACHMENTS

How to Add Attachments to a Subject's Worksheet or Case

Documents can be uploaded at any time from the Upload Attachments card located on the lower right side of the subject's profile. Documents are either uploaded within the context of a case or the subject's worksheet. Once a document is uploaded, it is available to attach to case requests, request responses, and other actions.

1. Select **Subject Management** from the Left Navigation Menu.
2. Select a subject's **Social Security number** hyperlink to view their worksheet.

Subject Management

My Subject List
Subjects in your organization are listed below. To include all subjects in your hierarchy, select the checkbox. Select the Advanced Search link to specify fields to search.

Search: Search on All Fields Include Subjects in My Hierarchy

[Advanced Search](#)

Total Results: 1,081

SSN	Last Name	First Name	Citizenship	Organization	Determination	Determination Status
[Redacted]	Olive	Sarah	United States	Defense Counterintelligence and Security Agency/1000C	---	---
[Redacted]	Cook	Tia	United States	Department of Security Managers/1005P	Secret	Active
[Redacted]	Jetson	Judy	United States	Office of Security Programs/1007F	Secret, Suitable/Fit	Active
[Redacted]	BERGMAN	KAREN	United States	Vetting Risk Operations CV/100P6	---	---

National Background Investigation Services

Search Subject by SSN

Bella, Stella 987-654-3210

Program Tags: [Actions]

Citizenship: United States Place of Birth: grove city, Pennsylvania Date of Birth: 01/01/1981 Aliases: N/A Contact Info: View

Profile Attachments Notes

Profile

Active Case History Vetting History

Active

Filter By: See All...

Cases [Expand All](#)

Case ID	Phase	Case Type	Start Date
22207BELL1453530	Adjudication	Recertify Eligibility Request	07/26/2022
21175BELL0729443	Initiation	---	06/24/2021

Add Notes

Organization*
Select Organization...

Title
Enter Title...

Notes
Enter Notes...

Upload Attachments

3. Scroll down to the **Upload Attachments** card on the Subject Worksheet.

National Background Investigation Services

Search Subject by SSN

Bella, Stella 987-654-3210

Program Tags: [Actions]

Citizenship: United States Place of Birth: grove city, Pennsylvania Date of Birth: 01/01/1981 Aliases: N/A Contact Info: View

Case ID: [21175BELL0729443](#) Phase: Initiation Case Type: --- Start Date: 06/24/2021 [See more](#)

Determinations [+ Grant Determination](#)

Type	Determination	Determined
Final	Suitable/Fit	07/06/2021

Affiliations [+ Add Affiliation](#)

Owning Organization	Category	Start Date
Defense Counterintelligence and Security Agency	Contractor	06/24/2021

Upload Attachments

Drag attachment here

[+ Select Attachments](#)
PDF, TIF, TIFF, JPG, JPEG, DOC, DOCX and PNG file types only

No attachments added.

Upload

4. Select the **+Select Attachments** hyperlink on the Upload Attachments card.
5. A File Upload box will appear. Select **Browse** to browse computer files to upload.
6. Select **the file** to upload.

The screenshot shows the National Background Investigation Services interface. The subject profile for Bella, Stella (SSN: 987-65-4321) is displayed. A 'File Upload' dialog box is open, asking 'Are you sure you want to upload a file?' with 'Browse' and 'Cancel' buttons. The 'Browse' button is highlighted. The 'Upload Attachments' card on the right side of the page has a '+ Select Attachments' button highlighted. Below the dialog box, the subject's details are shown: Citizenship: United States, Place of Birth: grove city, Pennsylvania, Date of Birth: 01/01/1981, Aliases: N/A, and Contact Info: View. The main content area contains a table for Case ID (21175BELL0729443), Phase (Initiation), Case Type, and Start Date (06/24/2021). Below this is a 'Determinations' section with a '+ Grant Determination' button and a table with columns for Type (Final), Determination (Suitable/Fit), and Determined (07/06/2021). The 'Affiliations' section has a '+ Add Affiliation' button and a table with columns for Owning Organization (Defense Counterintelligence and Security Agency), Category (Contractor), and Start Date (06/24/2021). The 'Upload Attachments' card on the right has a dashed box for dragging attachments, a '+ Select Attachments' button, and an 'Upload' button.

7. Alternatively, drag attachments to the **drag and drop location** on the Upload Attachments card to upload an attachment.

The screenshot shows the National Background Investigation Services interface. The subject profile for Bella, Stella (SSN: 987-65-4321) is displayed. The 'Upload Attachments' card on the right side of the page is highlighted with a yellow box. The card contains a dashed box for dragging attachments, a '+ Select Attachments' button, and an 'Upload' button. Below the dialog box, the subject's details are shown: Citizenship: United States, Place of Birth: grove city, Pennsylvania, Date of Birth: 01/01/1981, Aliases: N/A, and Contact Info: View. The main content area contains a table for Case ID (21175BELL0729443), Phase (Initiation), Case Type, and Start Date (06/24/2021). Below this is a 'Determinations' section with a '+ Grant Determination' button and a table with columns for Type (Final), Determination (Suitable/Fit), and Determined (07/06/2021). The 'Affiliations' section has a '+ Add Affiliation' button and a table with columns for Owning Organization (Defense Counterintelligence and Security Agency), Category (Contractor), and Start Date (06/24/2021).

8. Choose an **organization** from the Organization drop-down menu.

Note: This option is only available to a user that belongs to multiple organizations.

9. **Name** the attachment.

10. Choose a **category** from the Category drop-down menu.

National Background Investigation Services

Search Subject by SSN

Bella, Stella (987-654-3210) Program Tags: [Actions]

Citizenship: United States Place of Birth: grove city, Pennsylvania Date of Birth: 01/01/1981 Aliases: N/A Contact Info: View

Determinations + Grant Determination

Type	Determination	Determined
Final	Suitable/Fit	07/06/2021

See more

Affiliations + Add Affiliation

Owning Organization	Category	Start Date
Defense Counterintelligence and Security Agency	Contractor	06/24/2021

Access + Grant Access

This subject has no access at this time.

CV Enrollments

This subject has no CV Enrollments at this time.

Drag attachment here

+ Select Attachments
PDF, TIF, TIFF, JPG, JPEG, DOC, DOCX and PNG file types only

Organization*
Select Organization...

TEST.docx

Name*
TEST

Category*
Select..

Upload

11. Select **Upload**.

National Background Investigation Services

Search Subject by SSN

Bella, Stella (987-654-3210) Program Tags: [Actions]

Citizenship: United States Place of Birth: grove city, Pennsylvania Date of Birth: 01/01/1981 Aliases: N/A Contact Info: View

Determinations + Grant Determination

Type	Determination	Determined
Final	Suitable/Fit	07/06/2021

See more

Affiliations + Add Affiliation

Owning Organization	Category	Start Date
Defense Counterintelligence and Security Agency	Contractor	06/24/2021

Access + Grant Access

This subject has no access at this time.

CV Enrollments

This subject has no CV Enrollments at this time.

Drag attachment here

+ Select Attachments
PDF, TIF, TIFF, JPG, JPEG, DOC, DOCX and PNG file types only

Organization*
DCSA Adjudications -- /NBIS/FED/EXEC/CAB/DOD/4E/I

TEST.docx

Name*
TEST

Category*
16A Specific Release

Upload

A green success banner will appear.

National Background Investigation Services

Search Subject by SSN

Bella, Stella (987-654-3210) Program Tags: Actions

Citizenship: United States Place of Birth: grove city, Pennsylvania Date of Birth: 01/01/1981 Aliases: N/A Contact Info: View

Success. Attachment added.

Determinations

+ Grant Determination

Type	Determination	Determined
Final	Suitable/Fit	07/06/2021

[See more](#)

Affiliations

+ Add Affiliation

Owning Organization	Category	Start Date
Defense Counterintelligence and Security Agency	Contractor	06/24/2021

Access

+ Grant Access

This subject has no access at this time.

Drag attachment here

+ Select Attachments

PDF, TIF, TIFF, JPG, JPEG, DOC, DOCX and PNG file types only

No attachments added.

Upload

How to View Attachments

1. To view a subject's attachments, navigate to **Subject Management** on the Left Navigation Menu.
2. Select the **subject** to view.

National Background Investigation Services

Search Subject by SSN

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Subject Management

My Subject List

Subjects in your organization are listed below. To include all subjects in your hierarchy, select the checkbox. Select the Advanced Search link to specify fields to search on.

Search

Search on All Fields Include Subjects in My Hierarchy

Advanced Search

Total Results: 1,081

Table Settings Table View

SSN	Last Name	First Name	Citizenship	Organization	Determination	Determination Status
[REDACTED]	Olive	Sarah	United States	Defense Counterintelligence and Security Agency/1000C	---	---
[REDACTED]	Cook	Tia	United States	Department of Security Managers 1/1005P	Secret	Active
[REDACTED]	Jetson	Judy	United States	Office of Security Programs/1007F	Secret, Suitable/Fit	Active
[REDACTED]	BERGMAN	KAREN	United States	Vetting Risk Operations CV/100P6	---	---

3. View the subject's attachments by selecting the **Attachments** tab on the subject's worksheet.

National Background Investigation Services

Search Subject by SSN

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Bella, Stella

Program Tags:

Citizenship: United States Place of Birth: grove city, Pennsylvania Date of Birth: 01/01/1981 Aliases: N/A Contact Info: View

Success. Attachment added.

Profile Attachments Notes

Profile

Active Case History Vetting History

Active

Filter By: See All...

Cases [Expand All](#)

Case ID	Phase	Case Type	Start Date
22207BELL1453530	Adjudication	Recertify Eligibility Request	07/26/2022

[See more](#)

Add Notes

Organization*
Select Organization...

Title
Enter Title...

Notes
Enter Notes...

Add

4. Select the **Filter by** drop-down, select **Subject Profile**, then select **Apply** to filter the attachments by subject.

The screenshot shows the 'National Background Investigation Services' interface. The subject is 'Bella, Stella' with SSN '987-65-4321'. The 'Attachments' tab is active. A 'Filter by' dropdown menu is open, showing options: 'All Attachments', 'Subject Profile', and 'NBIS Case'. The 'Subject Profile' option is selected. The 'Apply' button is highlighted with a yellow box. Below the filter, a table of attachments is visible with columns: Category, Case #, Upload Date/Time, and Actions. One attachment is listed: '16A Specific Release' with Case # 'TEST' and Upload Date/Time '07/27/2022 10:27 AM'. To the right, there is an 'Add Notes' section with fields for Organization, Title, and Notes, and an 'Add' button.

Note: Attachments added within the context of a case will display with the corresponding Case ID.

5. Select the **Filter by** drop-down, select **NBIS Case**, then select **Apply** to filter the attachments by case.

The screenshot shows the 'National Background Investigation Services' interface for the same subject. The 'Attachments' tab is active. The 'Filter by' dropdown menu is open, showing options: 'All Attachments', 'Subject Profile', and 'NBIS Case'. The 'NBIS Case' option is selected. The 'Apply' button is highlighted with a yellow box. Below the filter, a table of attachments is visible with columns: Case #, Category, Upload Date/Time, and Actions. One attachment is listed: '16A Specific Release' with Case # 'TEST' and Upload Date/Time '07/27/2022 10:27 AM'. To the right, there is an 'Add Notes' section with fields for Organization, Title, and Notes, and an 'Add' button.

6. Select the **case** from the Case # drop-down menu.

The screenshot shows the 'National Background Investigation Services' interface. The subject is 'Bella, Stella' with SSN '987-65-4321'. The 'Attachments' section is active, with a filter by 'NBIS Case'. The 'Case #' dropdown menu is open, showing options: 'Select', '22207BELL1453530', and '21187BELL1159413'. The 'Apply' button is highlighted with a yellow box. Below the dropdown, a table lists attachments:

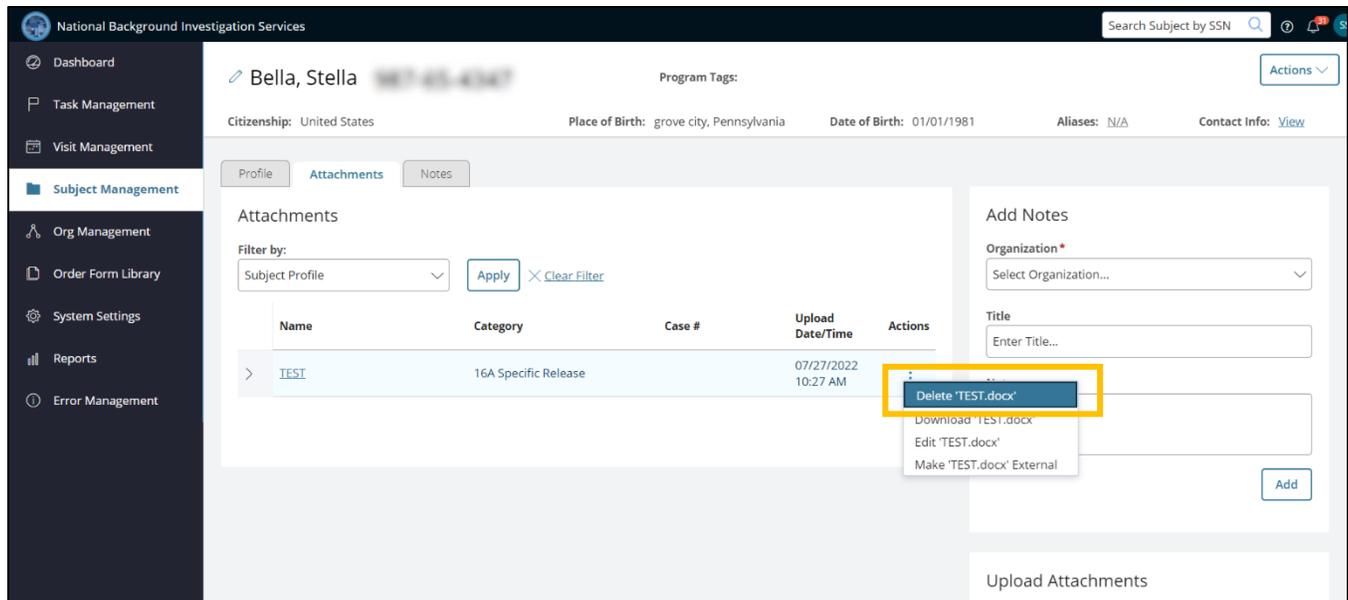
Name	Category	Case #	Upload Date/Time	Actions
> TEST	16A Specific Release		07/27/2022 10:27 AM	

7. Select **Apply**.

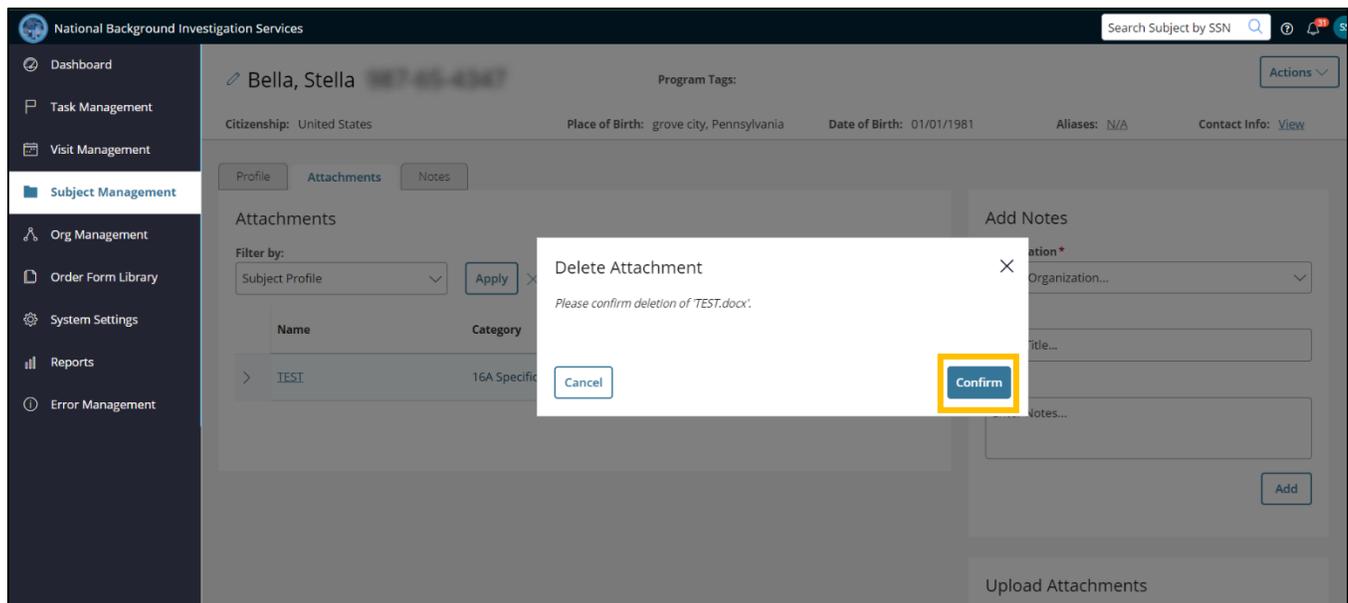
The screenshot shows the same interface as above, but the 'Case #' dropdown menu is now closed, and the 'Apply' button is highlighted with a yellow box. The table below the dropdown is empty, showing 'No attachments added.'

How to Delete Attachments

1. Select the **ellipses** to display additional options for attachments.
2. To delete the attachment, choose **Delete**.



3. A Delete Attachment box will appear. Select **Confirm** to confirm deletion of the attachment.



A green success banner will appear.

National Background Investigation Services

Search Subject by SSN

Bella, Stella (987-654-3210) Program Tags: Actions

Citizenship: United States Place of Birth: grove city, Pennsylvania Date of Birth: 01/01/1981 Aliases: N/A Contact Info: View

Success. Attachment TEST.docx has been deleted.

Profile Attachments Notes

Attachments

Filter by: Subject Profile Apply Clear Filter

Name	Category	Case #	Upload Date/Time	Actions
TEST	16A Specific Release		07/27/2022 10:27 AM	

Add Notes

Organization* Select Organization...

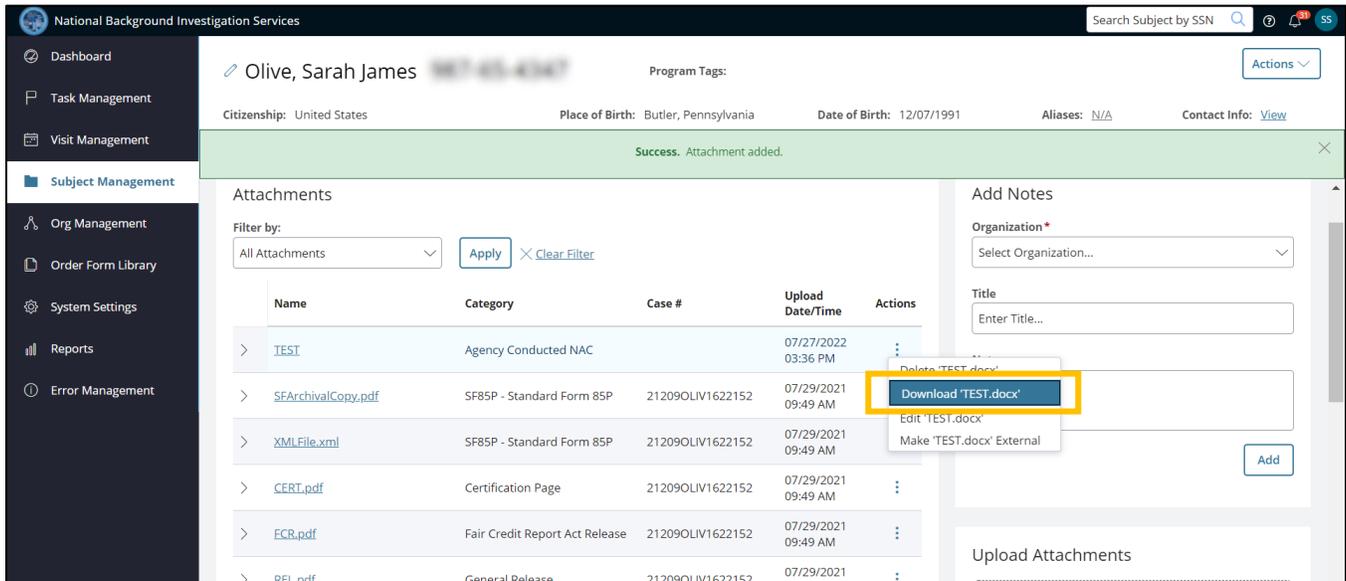
Title Enter Title...

Notes Enter Notes...

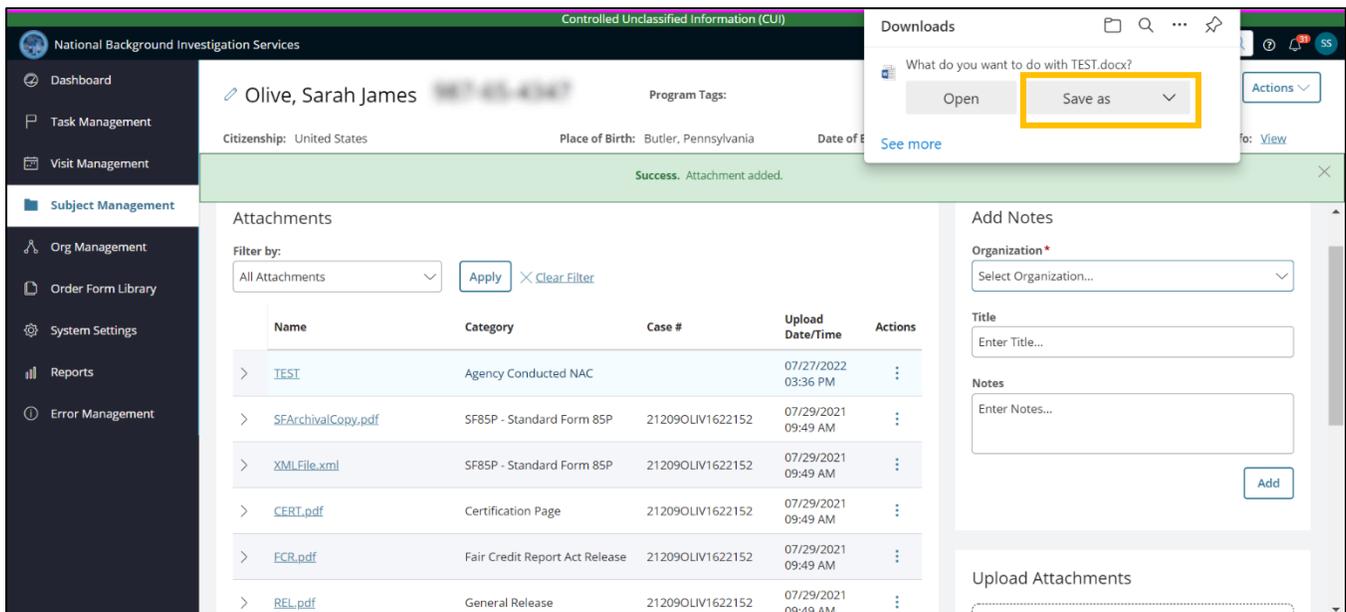
Add

How to Download Attachments

1. To download an attachment, select **Download** from the ellipses.

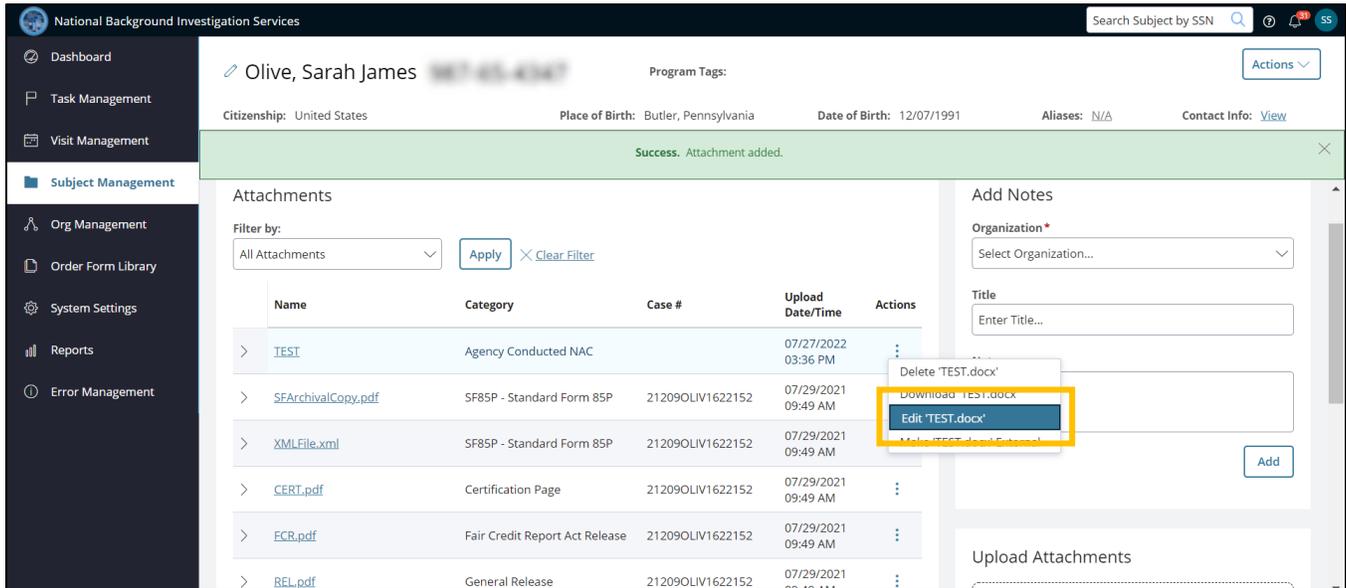


2. Select **Save As** to download the attachment.

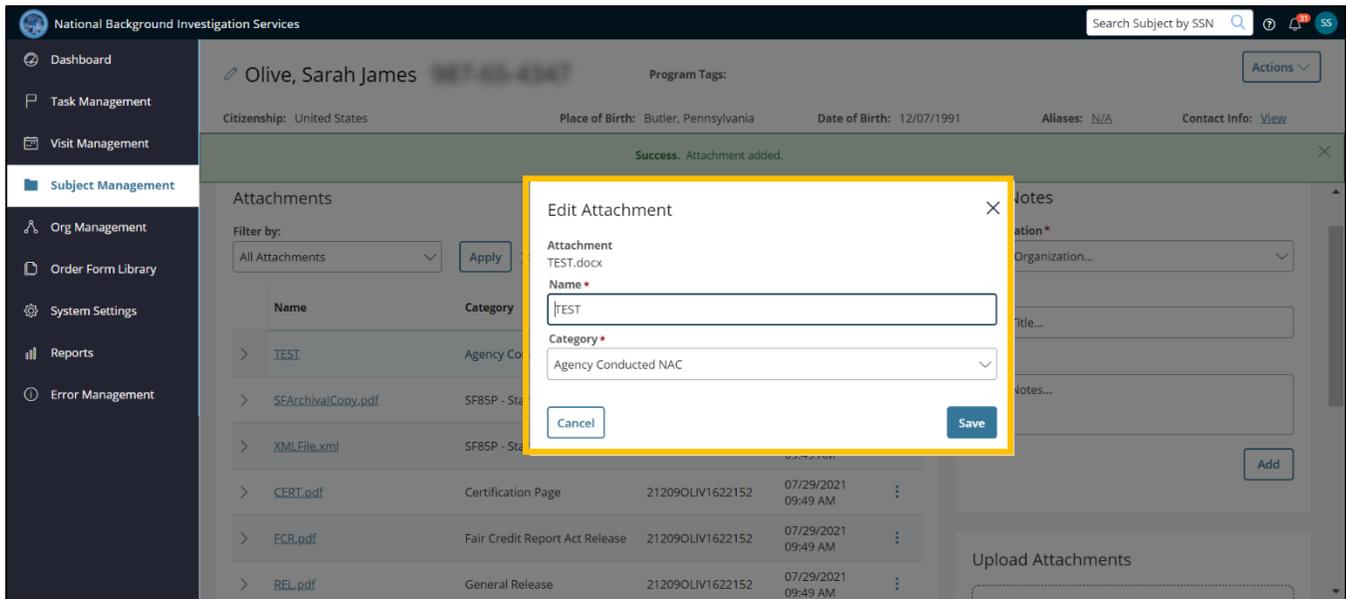


How to Edit Attachments

1. To edit an attachment, select **Edit** from the ellipses.



2. An Edit Attachment box will appear. Edit the name of the attachment or the category it belongs to, as needed.



In the below example, the name of the attachment was edited.

3. Select **Save** when finished editing.

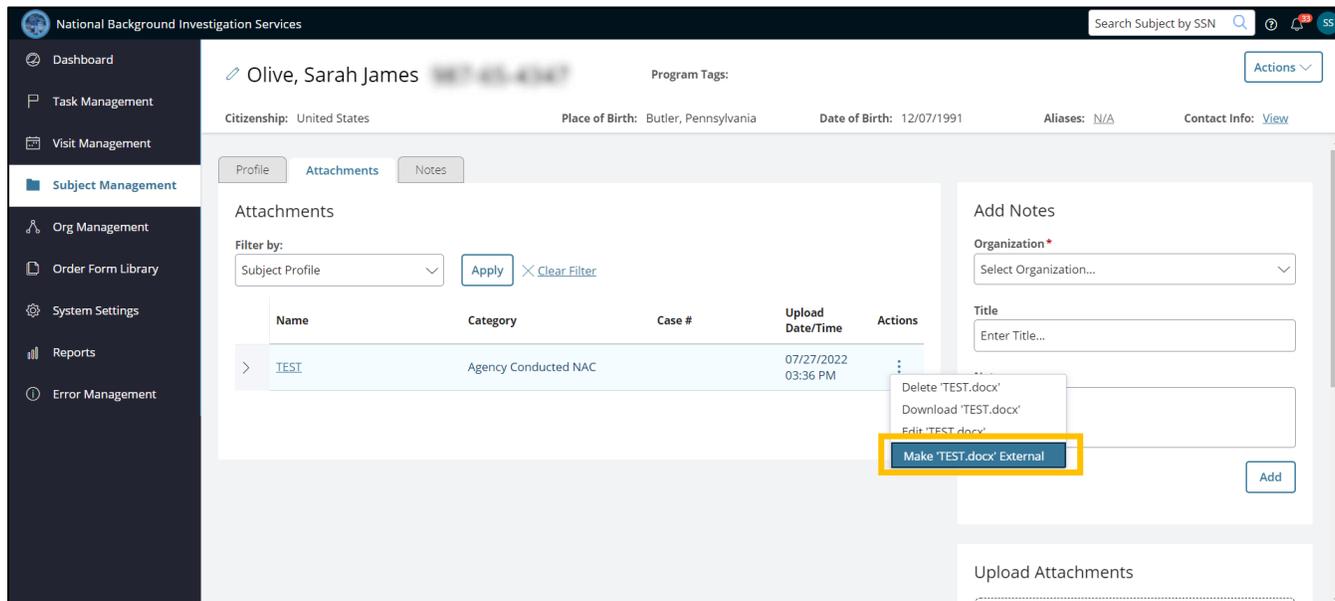
The screenshot displays the National Background Investigation Services (NBIS) interface. The main header shows the subject's name, Olive, Sarah James, and various personal details like citizenship, birthplace, and date of birth. A sidebar on the left contains navigation options such as Dashboard, Task Management, and Subject Management. The central area shows a list of attachments. An 'Edit Attachment' dialog box is open, allowing the user to modify the name and category of a selected attachment. The name field is currently set to 'TEST Version 2', and the category is 'Agency Conducted NAC'. The 'Save' button is highlighted with a yellow box, indicating the final step in the editing process.

Name	Category	Attachment
TEST	Agency Con...	TEST.docx
SFArchivalCopy.pdf	SF85P - Star...	
XMLFile.xml	SF85P - Star...	
CERT.pdf	Certification Page	21209OLIV1622152
ECR.pdf	Fair Credit Report Act Release	21209OLIV1622152
REL.pdf	General Release	21209OLIV1622152

How to Make an Attachment External

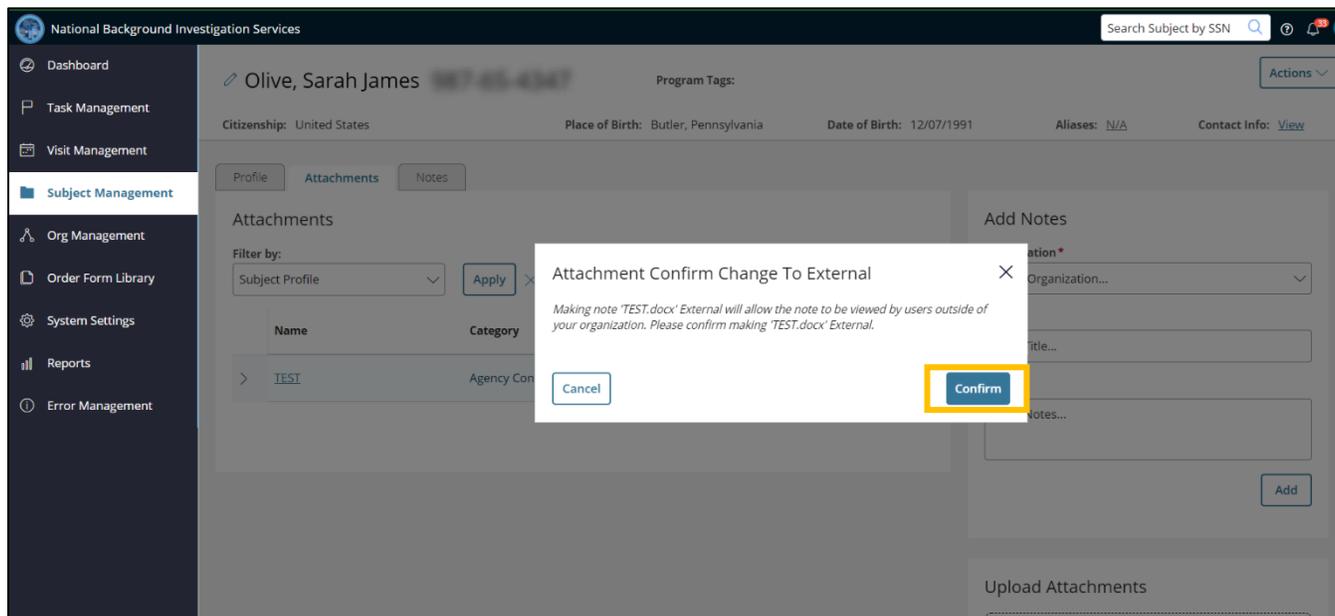
NBIS users who have an affiliation with the subject can view external attachments.

1. Select the **Make External** option from the ellipses.



The screenshot shows the NBIS interface for subject Olive, Sarah James. The 'Attachments' section is active, displaying a table with one attachment named 'TEST' in the 'Agency Conducted NAC' category, uploaded on 07/27/2022 at 03:36 PM. A dropdown menu is open over the 'TEST' attachment, showing options: 'Delete TEST.docx', 'Download TEST.docx', 'Edit TEST.docx', and 'Make TEST.docx External'. The 'Make TEST.docx External' option is highlighted with a yellow box.

2. An Attachment Confirm Change To External box will appear. Select **Confirm**.



The screenshot shows the NBIS interface with the 'Attachment Confirm Change To External' dialog box open. The dialog box contains the text: 'Making note TEST.docx External will allow the note to be viewed by users outside of your organization. Please confirm making TEST.docx External.' The 'Confirm' button is highlighted with a yellow box.

A green success banner will appear.

National Background Investigation Services

Search Subject by SSN

Olive, Sarah James (987-65-4321) Program Tags: Actions

Citizenship: United States Place of Birth: Butler, Pennsylvania Date of Birth: 12/07/1991 Aliases: N/A Contact Info: View

Success. Attachment TEST.docx has been marked as External.

Profile Attachments Notes

Attachments

Filter by: Subject Profile Apply Clear Filter

Name	Category	Case #	Upload Date/Time	Actions
TEST	Agency Conducted NAC		07/27/2022 03:36 PM	

Add Notes

Organization* Select Organization...

Title Enter Title...

Notes Enter Notes...

Add

