Job Aid

# 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.

	National Background Inve	estigation Services					Sea	arch Subject by SSN 🛛 🔍	@ 🗘 😒			
Ø	Dashboard	Subject Mar	nagement									
Р	Task Management											
Ē	Visit Management	My Subject	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 seal or nor. Search									
	Subject Management	Subjects in your of Search										
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		302-02-020	Cook	Tia	United States	Department of Security Managers 1/1005P	Secret	Active				
		965-85-2455	Jetson	Judy	United States	Office of Security Programs/1007F	Secret, Suitable/Fit	Active				
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	Error Management	See All V					Notes	
		Cases				Expand All	Enter Notes	
		Case ID 22207BELL1453530	Phase Adjudication	Case Type Recertify Eligibility Request	Start Date 07/26/2022			
						See more		Add
		Case ID	Phase	Case Type	Start Date			
		21175BELL0729443	Initiation		06/24/2021	See more	Upload Attachments	

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

6	National Background Inve	estiga	tion Services					Search Subject by SSN 🔍 🕢 🗘
Ø	Dashboard	6	🖉 Bella, Stella	Program Tags:			$\fbox{Actions}{} \checkmark$	
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Ē	Visit Management						See more	
	Subject Management		Case ID	Phase	Case Type	Start Date	2	
ጼ	Org Management		21175BELL0729443	Initiation		06/24/202	1 See more	Upload Attachments
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								No attachments added.
			Affiliations				+ Add Affiliation	
			Owning Organization Defense Counterintelligence Security Agency	Category and Contractor		Start Date 06/24/2021	:	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.

		Controlled Unclassified Informa	ition (CUI)	
National Background Inv	estigation Services	File Upload	×	Search Subject by SSN 🔍 🗿 🗘
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👼 Visit Management	Citizenship: United States	Place of Birth: gro	Date of Birth: 01/01/198	31 Aliases: <u>N/A</u> Contact Info: <u>View</u>
			See more	
Subject Management	Case ID Phase	Case Type	Start Date	
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al Penorts	Type Determination	Determined		
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(i) Error Management			See more	
	A 55 11 - 11 - 12 - 12			No attachments added.
	Annations		+ Add Affiliation	
	Owning Organization Category Defense Counterintelligence and Contractor Security Agency	Start I 06/24/	Date :	Upload

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

6	National Background Inve	estiga	tion Services					Search Subje	ect by SSN 🔍 🍞 🖓
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	Subject Management		Case ID	Phase	Case Type	Start Da	te		
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			Affiliations				+ Add Affiliation		
			Owning Organization Defense Counterintelligence Security Agency	Category e and Contractor		Start Date 06/24/2021	:		Upload

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 Inve	stigation Services			Search Subject by SSN 🔍 💿 🗳
Ø	Dashboard	🖉 Bella, Stella	Program Tags:		$$ Actions $\checkmark$
Р	Task Management	Citizenship: United States	Place of Birth: grove city, Pennsylvania	Date of Birth: 01/01/1981	Aliases: N/A Contact Info: View
ē	Visit Management	Determinations		+ Grant Determination	Drag attachment here
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		This subject has no access at this time.			Select
		CV Enrollments			
Γ_		This subject has no CV Enrollments at this time.			Upload

# 11. Select Upload.

	National Background Inve	stigation Services			Search Subject by SSN 🔍 🗿 🔑 🤇
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					TEST
		Access		+ Grant Access	Category*
		This subject has no access at this time.			16A Specific Release 🗸 🗸
		CV Enrollments			
		This subject has no CV Enrollments at this time.			Upload

A green success banner will appear.

6	National Background Inve	stigation Services		Search Subject by SSN 🔍 🖲 🚅 🖙
Ø	Dashboard	🖉 Bella, Stella	Program Tags:	$\fbox{Actions}{} \lor$
Р	Task Management	Citizenship: United States	Place of Birth: grove city, Pennsylvania Date of Birth: 0	1/01/1981 Aliases: N/A Contact Info: <u>View</u>
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		This subject has no access at this time.		

### 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 I	nvestigation Services						Search Subject by SSN 🔍 💿 🔎				
Ø Dashboard	Subject Ma	inagement									
🏳 Task Management											
📅 Visit Management	My Subjec	t List					Actions				
Subject Management	Subjects in you Search	Subjects in your organization are instea below. To include an subjects in your merarchy, select the checkbox, select the Advanced Search link to specify helds to sear <del>ch for.</del>									
人 Org Management	Search on All	Fields	(	Contraction Include Sub	jects in My Hierarchy						
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Ø System Settings							Table Settings V Table View V				
💵 Reports	SSN	Last Name =	First Name	Citizenship	= Organization	= Determination	😇 Determination Status 😇				
(i) Error Management	365.65.265	Olive	Sarah	United States	Defense Counterintelligence and Security Agency/1000C						
	10141-014	Cook	Tia	United States	Department of Security Managers 1/1005P	Secret	Active				
	35.6.765	Jetson	Judy	United States	Office of Security Programs/1007F	Secret, Suitable/Fit	Active				
	10.41.414	BERGMAN	KAREN	United States	Vetting Risk Operations CV/100P6	11 <del>-11-</del> 1					

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

	National Background Inve	stigation Services			Searc	ch Subject by SSN 🔍 💿 🗳 SS
Ø	Dashboard	🖉 Bella, Stella	Program Tags:			Actions $\checkmark$
Р	Task Management	Citizenship: United States	Place of Birth: grove city, Pennsylva	nia Date of Birth: 01/01/	1981 Aliases: N/A	Contact Info: <u>View</u>
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()	Error Management	Filter By			Enter Title	
		See All 🗸			Notes	
		Cases		Expand All	Enter Notes	
		Case ID Phase	Case Type S	Start Date		
		Augurato	. necercity englowing nequest	See more		Add
		Case ID Dhase	Case Tumo de	Start Data		*

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

	National Background Inve	estigation Services					Search Subject by SSN 🔍 📀	🗘 🖓 😒
Ø	Dashboard	🖉 Bella, Stella	4047	Program Tags:			Acti	ons 🗸
Ρ	Task Management	Citizenship: United States	Place of Birth:	grove city, Pennsylvania	Date of Birth: 0	1/01/1981 Aliases:	N/A Contact Info: Vir	<u>ew</u>
Ē	Visit Management							A
	Subject Management	Profile Attachments Notes						
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۵	Order Form Library	Filter by: Subject Profile	Apply × <u>Clear Filter</u>			Select Organization*		$\overline{}$
¢	System Settings	All Attachments Subject Profile	Category	Case #	Upload Action	Title		
11	Reports	NBIS Case	cutegory	cuse #	Date/Time	Enter Title		
س	Error Management	> TEST	16A Specific Release		10:27 AM	Notes		
Ū	Lifer management					Enter Notes		
								_
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						Upload Attach	ments	

**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.

	National Background Inve	estigation Services					Search Subject by SSN	2 🕐 🗘
Ø	Dashboard	🖉 Bella, Stella	647	Program Tags:				Actions $\checkmark$
Р	Task Management	Citizenship: United States	Place of Birth:	grove city, Pennsylvania	Date of Birth: 01/01/	1981 Aliases:	N/A Contact In	fo: <u>View</u>
Ē	Visit Management							^
	Subject Management	Profile Attachments Notes						
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ø	System Settings	All Attachments Subject Profile	Category	Case #	Upload Actions	Title		_
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0	Error Management	> IESI	T6A Specific Release		10:27 AM	Notes		
						Enter Notes		
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6. Select the **case** from the Case # drop-down menu.

	National Background Inves	stigation Services				Search Subj	ect by SSN 🔍 🕘 🖓 🔊
Ø	Dashboard	🖉 Bella, Stella	Pro	gram Tags:			Actions $\checkmark$
	Task Management	Citizenship: United States	Place of Birth: grov	e city, Pennsylvania Date of	Birth: 01/01/1981	Aliases: N/A	Contact Info: <u>View</u>
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٥	Order Form Library	Filter by: NBIS Case ~	Case #	Apply × <u>Clear Filter</u>		Organization* Select Organization	~
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atl	Reports	\ TEST	164 Specific Pelease	07/27/2022	:	Enter Title	
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# 7. Select Apply.

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Ö	Visit Management		*
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٥	Order Form Library	Filter by:     Case #       NBIS Case     22207BELL1453530	Organization * Select Organization
Ô	System Settings	Name Category Case # Upload Actions	Title
11	Reports	No attachments added.	Enter Title
()	Error Management		Notes
			Add
			Upload Attachments

### How to Delete Attachments

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

	National Background Inve	estigation Se	ervices					Search Subject	by SSN 🔍 🕘 🖓
Ø	Dashboard	Ø Be	ella, Stella	10.424347	Program	Tags:			$\fbox{Actions} \lor$
Р	Task Management	Citizens	hip: United States		Place of Birth: grove city,	Pennsylvania Date o	f Birth: 01/01/19	81 Aliases: N/A	Contact Info: <u>View</u>
ē	Visit Management								
	Subject Management	Profile	Attachments	Notes					
ጼ	Org Management	Atta	chments					Add Notes	
۵	Order Form Library	Filter Subj	by: ect Profile	Apply	X <u>Clear Filter</u>			Organization * Select Organization	$\sim$
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		-					Make 'TE	ST.docx' External	
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3. A Delete Attachment box will appear. Select **Confirm** to confirm deletion of the attachment.

	National Background Inve	estigation Services		Search Subject by SSN 🔍 🕘 🧬
Ø	Dashboard	🖉 Bella, Stella	Program Tags:	Actions ~
Ρ	Task Management	Citizenship: United States	Place of Birth: grove city, Pennsylvania Date of Birth: 01/0	01/1981 Aliases: N/A Contact Info: View
ē	Visit Management			
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ul	Reports			īde
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A green success banner will appear.

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nt	Reports		Name	Category	Case	¢ Upl	load	Actions	Title		
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# How to Download Attachments

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

	National Background Inve	estigation S	ervices					Search Subject	ct by SSN 🔍 🕐	Ĵ <sup>33</sup> SS
Ø	Dashboard	Ø 0	live, Sarah James	987-65-4347	Program Tags:				Actions	s ∨
Ρ	Task Management	Citizen	ship: United States	Place of Birth	: Butler, Pennsylvania	Date of B	irth: 12/07/199	1 Aliases: <u>N/A</u>	Contact Info: View	
Ö	Visit Management				Success. Attachment add	led.				×
	Subject Management	Atta	achments					Add Notes		•
ሌ	Org Management	Filter	by:					Organization *		
۵	Order Form Library	All A	Attachments	Apply × <u>Clear Filter</u>				Select Organization	~	J
¢	System Settings		Name	Category	Case #	Upload Date/Time	Actions	Title Enter Title		1
00 <b>0</b>	Reports	>	TEST	Agency Conducted NAC		07/27/2022 03:36 PM	Delete 'TE	ST docy'		,
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		>	CERT.pdf	Certification Page	21209OLIV1622152	07/29/2021 09:49 AM	+			J
		>	FCR.pdf	Fair Credit Report Act Release	21209OLIV1622152	07/29/2021 09:49 AM	÷	Lipload Attachmonts		
		$\rightarrow$	REL.pdf	General Release	21209OLIV1622152	07/29/2021				

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

	Controlled Undassified Information (CUI) Downloads 🗅 Q … 🔗												
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	Subject Management	Atta	achments					Add Notes		-			
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#### How to Edit Attachments

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

	National Background Inve	stigatio	n Services					Search Subje	ct by SSN 🔍 🕑 🦨 😒
Ø	Dashboard	0	Olive, Sarah James	987-65-4347	Program Tags:				Actions $\lor$
Р	Task Management	Citi	zenship: United States	Place of Birt	h: Butler, Pennsylvania	Date of Bir	r <b>th:</b> 12/07/199	1 Aliases: N/A	Contact Info: View
Ö	Visit Management				Success. Attachment add	led.			×
	Subject Management	A	ttachments					Add Notes	•
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۵	Order Form Library		All Attachments	✓ Apply × <u>Clear Filter</u>				Select Organization	~
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			> XMLFile.xml	SF85P - Standard Form 85P	21209OLIV1622152	07/29/2021 09:49 AM	Edit TEST		Add
			CERT.pdf	Certification Page	21209OLIV1622152	07/29/2021 09:49 AM			
			> <u>FCR.pdf</u>	Fair Credit Report Act Release	21209OLIV1622152	07/29/2021 09:49 AM	÷	Lipload Attachments	
			> REL.pdf	General Release	21209OLIV1622152	07/29/2021			

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

	National Background Inve	estigation S	ervices							Search Sub	iect by SSN 🔍 🛛	<mark>ل<sup>30</sup> دی</mark>
Ø	Dashboard	00	live, Sarah James			Program Tags:					Actio	ns 🗸
Р	Task Management	Citizer	ship: United States		Place of Birth:	: Butler, Pennsylvania	Date of Bi	rth: 12/07	7/1991	Aliases: N/A	Contact Info: <u>Viev</u>	¥
Ē	Visit Management					Success. Attachment adde	ed.					×
	Subject Management	Atta	achments		Edit Attach	mont			×	lotes		^
ሌ	Org Management	Filte	r by:		Attachment	inent			~	ation*		_
D	Order Form Library	AIL	Attachments 🗸	Apply	TEST.docx					Organization	×	
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		>	ECR.pdf	Fair Credit Re	eport Act Release	21209OLIV1622152	07/29/2021 09:49 AM	:	Uplo	ad Attachments		
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In the below example, the name of the attachment was edited.

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

	National Background Inve	estigation S	Services							Search Subj	ject by SSN 🔍	) 🖓 SS
Ø	Dashboard	<i>0</i> C	live, Sarah James			Program Tags:					Act	ions 🗸
Р	Task Management	Citizer	nship: United States		Place of Birth:	Butler, Pennsylvania	Date of I	lirth: 12/07	7/1991	Aliases: N/A	Contact Info: V	ew
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### 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.

	National Background Inve	stigation Se	ervices							Search Subject by SSN	0 🗘 😒
Ø	Dashboard	0 O	live, Sarah Jam	es	145-4347	Program Tags:					Actions $\checkmark$
Р	Task Management	Citizens	hip: United States		Place of	of Birth: Butler, Pennsylvania	Date of B	lirth: 12/07/19	91 Aliases:	: <u>N/A</u> Contact In	fo: <u>View</u>
Ē	Visit Management				)						<b>^</b>
	Subject Management	Profile	Attachments	Notes							
ሌ	Org Management	Atta	chments						Add Notes		
٥	Order Form Library	Filter Subj	<b>by:</b> ect Profile	$\sim$	Apply × Clear Filter				Organization*	1	~
¢	System Settings		Name		Category	Case #	Upload Date/Time	Actions	Title		
000	Reports	>	TEST		Agency Conducted NAC		07/27/2022 03:36 PM	:			
0	Error Management						03.50 T M	Delete 'T Downloa Edit 'TES' Make 'Tf	EST.docx' ad 'TEST.docx' T.docx' EST.docx' External		Add
									Upload Attach	ments	

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

6	National Background Inve	estigation Services		Search Subject by SSN 🔍 🕘 🦚
Ø	Dashboard	Ø Olive, Sarah James	Program Tags:	Actions ~
Ρ	Task Management	Citizenship: United States	Place of Birth: Butler, Pennsylvania Date of Birth: 12/07/199	11 Aliases: N/A Contact Info: View
	Visit Management			
	Subject Management	Profile Attachments Notes		
ጼ	Org Management	Attachments		Add Notes
٥	Order Form Library	Subject Profile	Attachment Confirm Change To External	× Organization ~
ø	System Settings	Name Cat	Making note 'TEST.docx' External will allow the note to be viewed by users outsia your organization. Please confirm making 'TEST.docx' External.	le of
010	Reports	TEST Arr		ītle
(i)	Error Management	/ <u>1131</u> ^8	Cancel	votes
				Add
				Upland Attachments

A green success banner will appear.

6	National Background Inve	estigation Se	ervices						Search Subject	t by SSN 🔍 🧿 🖉
Ø	Dashboard	0 OI	live, Sarah James	10.45-4547		Program Tags:				Actions $\checkmark$
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0	Error Management		Name	category		Case #	Date/Time	Actions	Enter Title	
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									Enter Notes	
										Add

