



## CASE NOTES

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**Purpose:** To demonstrate the process of adding notes to a subject’s existing case.

## CASE NOTES

How to Add Case Notes to a Subject’s Worksheet or Case

1. From the Left Navigation Menu, select **Task Management**.
2. Select the **Case ID** hyperlink from the Case ID column to open the Case Worksheet.

The screenshot shows the 'Task Management' page in the NBIS system. The left-hand navigation menu is visible, with 'Task Management' selected. The main content area displays a table of tasks under the 'My Work' tab. The table has the following columns: Case ID, Case Type, Last Name, Status, Task Age (Days), Case Owner, and Assigned on. The row with Case ID '210286CRAB1410458' is highlighted with a red box.

Case ID	Case Type	Last Name	Status	Task Age (Days)	Case Owner	Assigned on
<a href="#">220105COT1116042</a>	Tier 3 Reinvestigation	Scott	Review - Pending eApp	70		3/4/22
<a href="#">211825COT1429575</a>	Tier 2	Scott	Received	263		3/4/22
<a href="#">211875MIT1203314</a>	Tier 3	Smithers	Received	258		3/4/22
<b><a href="#">210286CRAB1410458</a></b>	Tier 1	Crab	Received	33		3/4/22
<a href="#">MA-26</a>	---	---	New	32		3/4/22
<a href="#">MA-25</a>	---	---	Validating	32		3/4/22
<a href="#">MA-23</a>	---	---	Validating	26		3/4/22
<a href="#">22046KORN1422496</a>	Tier 3 Reinvestigation	Kornikova	Authorization	34		3/10/22

3. Navigate to the **Add Notes** card.
4. Enter a title for the note in the Title text field.
5. Enter a note in the Notes text field.

**Note:** If the user is affiliated with more than one organization, selecting an organization from the Organization drop-down is required.

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

Ricardo, Ricky

Program Tags: Actions

Citizenship: United States Place of Birth: New York, New York Date of Birth: 06/12/1975 Aliases: N/A Contact Info: View

Quality Assurance Phase: ADJUDICATION 02/14/2022 Status: RECEIVED 02/14/2022 Collapse

Case ID: 22045RICA1347139 Assigned To: Assigned On: 03/23/2022

Profile Attachments Notes Guidelines

Profile

Active Case History Vetting History

Active

Filter By See All...

Cases Expand All

Case ID	Phase	Case Type	Start Date
<a href="#">22045RICA1347139</a>	Adjudication	Quality Assurance	02/14/2022
<a href="#">22055RICA1547133</a>	Component Adjudication	Tier 3	02/24/2022

See more See more

Determinations

Case Actions

No actions available at this time.

Add Notes

Organization \* Defense Counterintelligence and Security Agency -- /NBIS/FED/EXEC/C

Title Example Notes

Notes Case notes go here.

Add

6. Select the **Add** button to add the note to the case.

Add Notes

Organization \* Defense Counterintelligence and Security Agency -- /NBIS/FED/EXEC/C

Title Example Notes

Notes Case notes go here.

Add

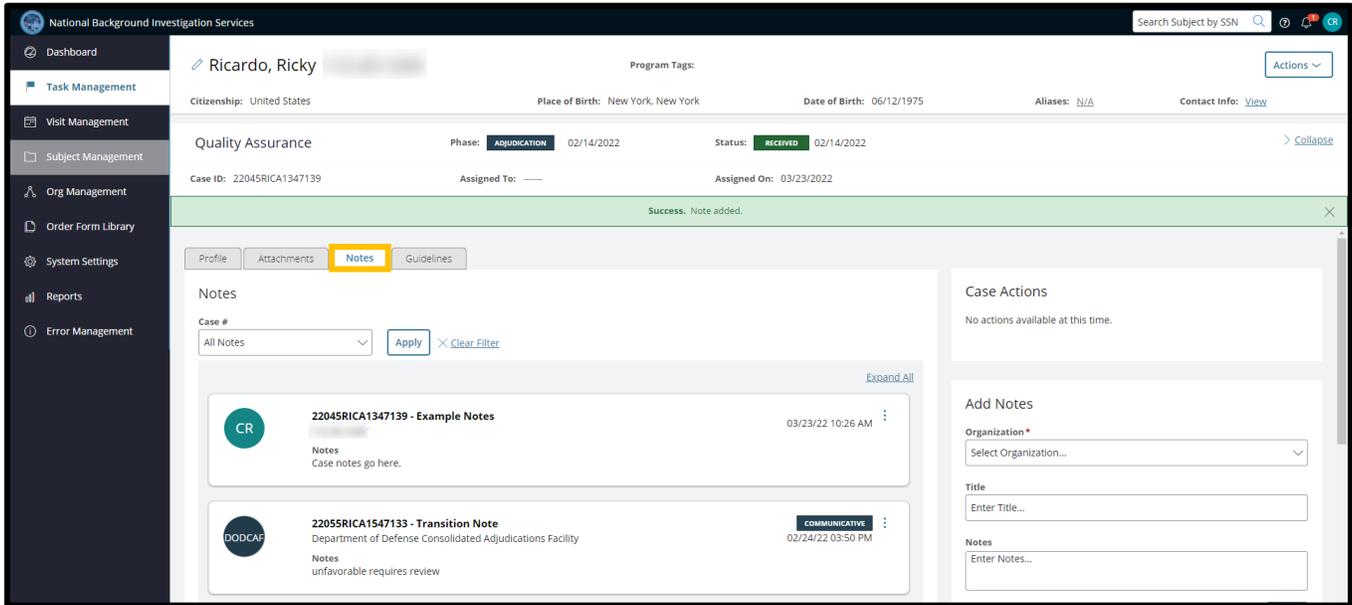
7. The green success banner confirms the note has been added successfully.

The screenshot displays the National Background Investigation Services (NBIS) web application. The top navigation bar includes the title "National Background Investigation Services" and a search function "Search Subject by SSN". The main header shows the subject's name "Ricardo, Ricky" and "Program Tags". Below this, key information is listed: Citizenship: United States, Place of Birth: New York, New York, Date of Birth: 06/12/1975, Aliases: N/A, and Contact Info: [View](#). The "Quality Assurance" section shows Phase: ADJUDICATION (02/14/2022) and Status: RECEIVED (02/14/2022). A case ID of 22045RICA1347139 is also present, along with an assigned date of 03/23/2022. A prominent green success banner with a yellow border reads "Success. Note added." Below this, the "Profile" tab is active, showing a "Filter By" dropdown set to "See All...". The "Case Actions" section indicates "No actions available at this time." The "Add Notes" section has a dropdown menu for "Organization \*".

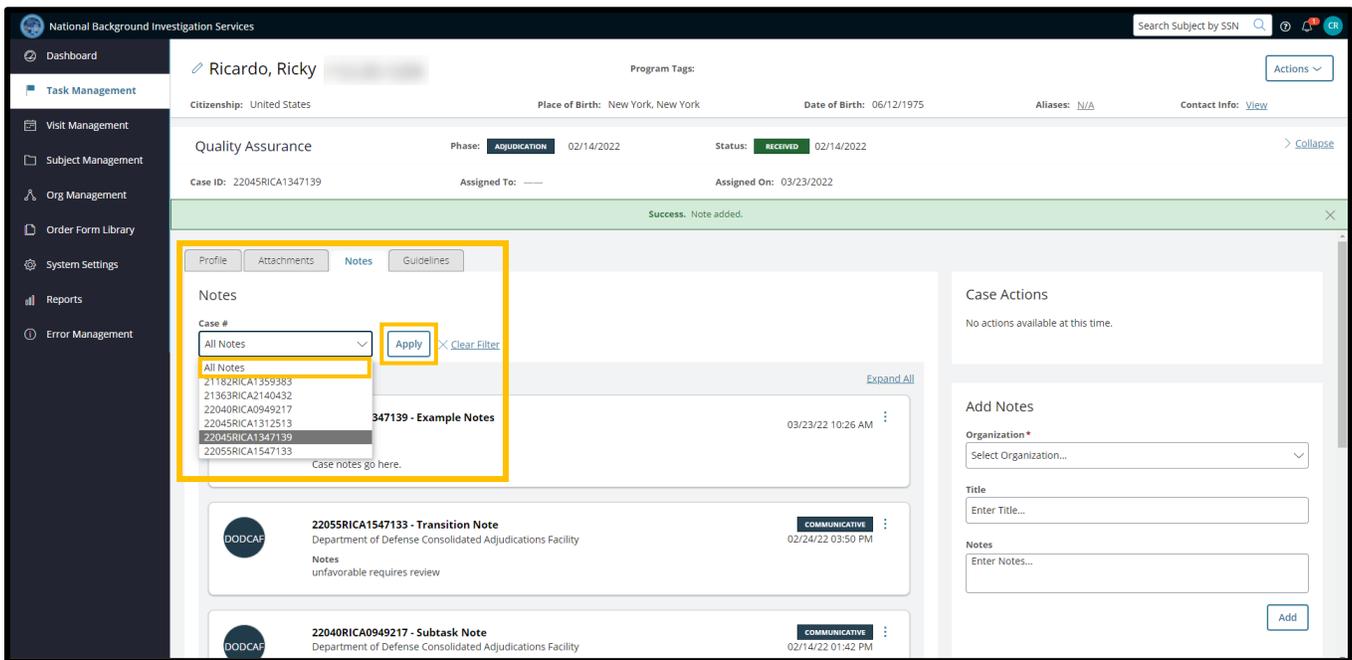
# Additional Features for a Case Note

1. Select the **Notes** tab to view the recently added note.

**Note:** Notes added within the context of a case will display in the respective Case ID.



2. The Case # drop-down allows users to view notes for all cases or a specific case associated with a different Case ID. Select **All Notes** from the Case # drop-down and then select **Apply**.



**Note:** Communicative notes are part of communications between organizations.

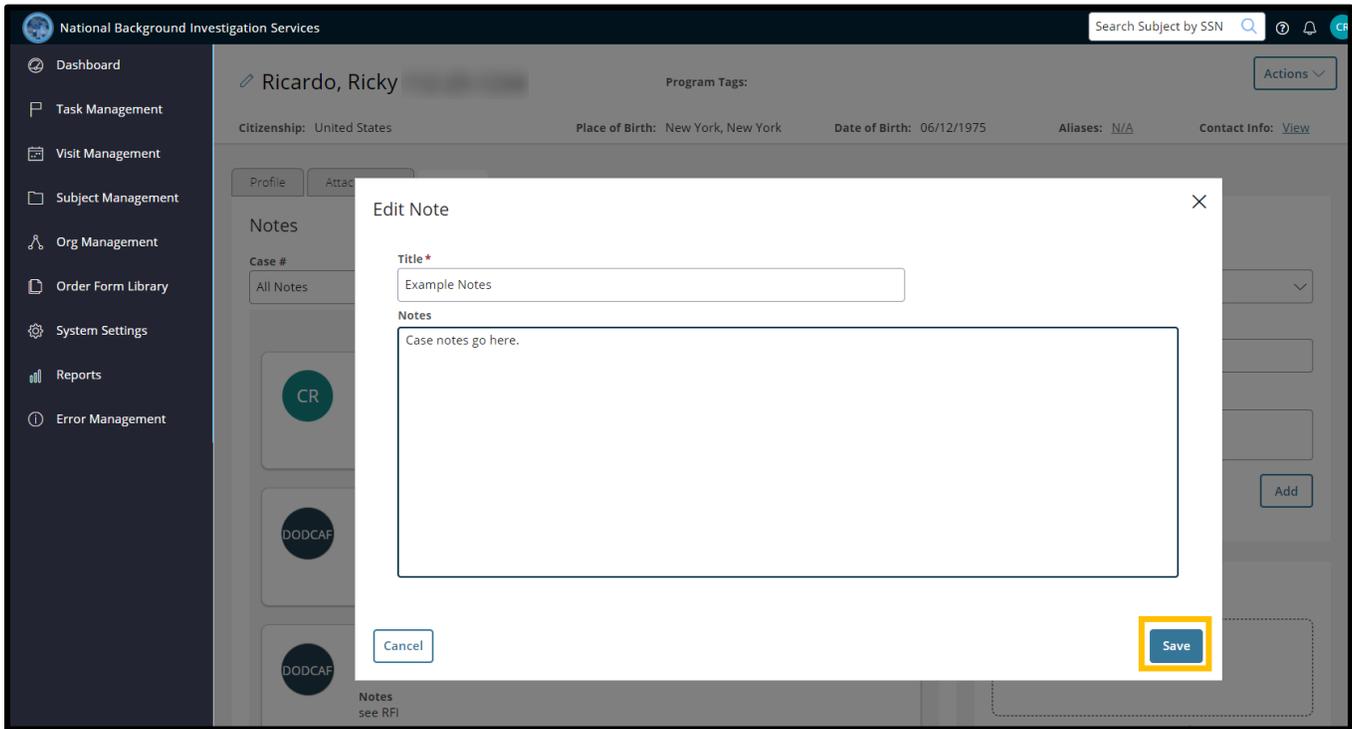
3. To view additional options for a note, select the **ellipses**.

The screenshot displays the 'National Background Investigation Services' interface. The main content area shows a profile for 'Ricardo, Ricky' with various fields like Citizenship, Place of Birth, and Date of Birth. Below this, there's a 'Quality Assurance' section with a phase of 'ADJUDICATION' and a status of 'RECEIVED'. A green notification bar at the top indicates 'Success. Note added.' The 'Notes' section is highlighted with a yellow box, showing a note titled '22045RICA1347139 - Example Notes' with a date of '03/23/22 10:26 AM' and an ellipsis menu icon. The 'Add Notes' section on the right includes a dropdown for 'Organization \*' and a text input for 'Title'.

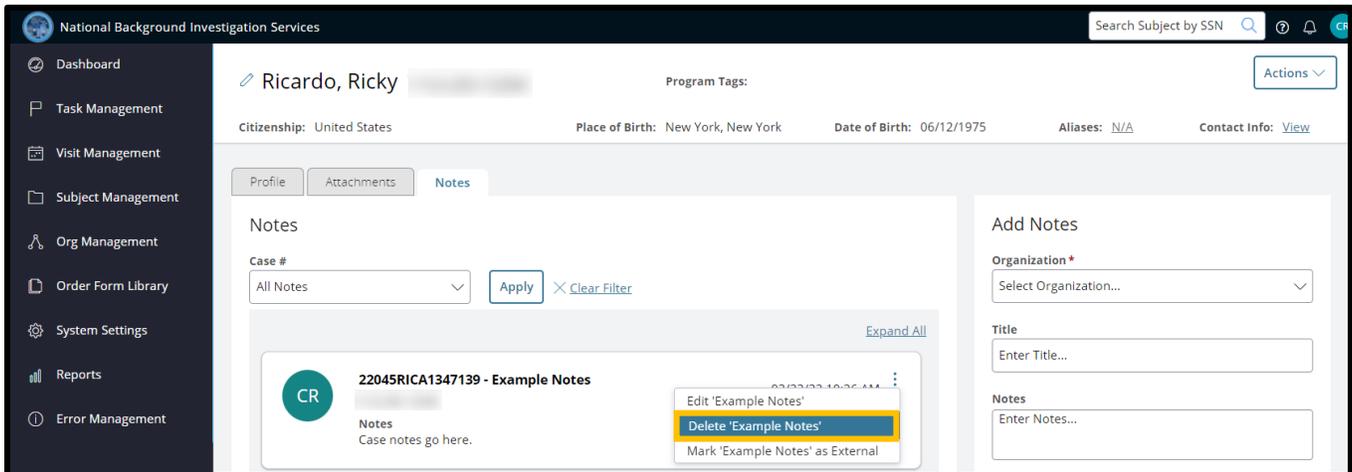
4. To edit a note, select the **Edit** option from the ellipses drop-down.

This screenshot shows the same interface as the previous one, but with the ellipsis menu for the note '22045RICA1347139 - Example Notes' open. The menu options are 'Edit 'Example Notes'', 'Delete 'Example Notes'', and 'Mark 'Example Notes' as External'. The 'Edit' option is highlighted with a yellow box. The 'Add Notes' section on the right is also visible, showing the 'Organization \*' dropdown and the 'Title' input field.

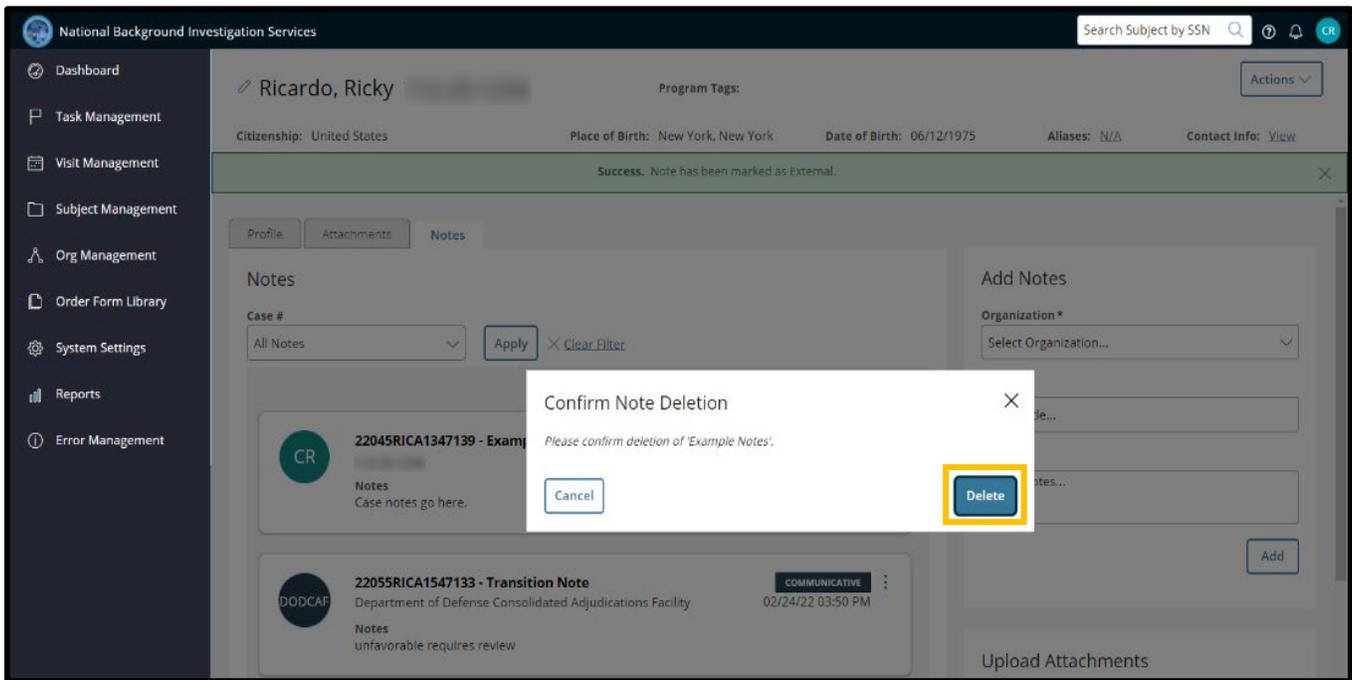
5. In the Edit Note modal, make the desired changes in the Notes text field and select **Save**.



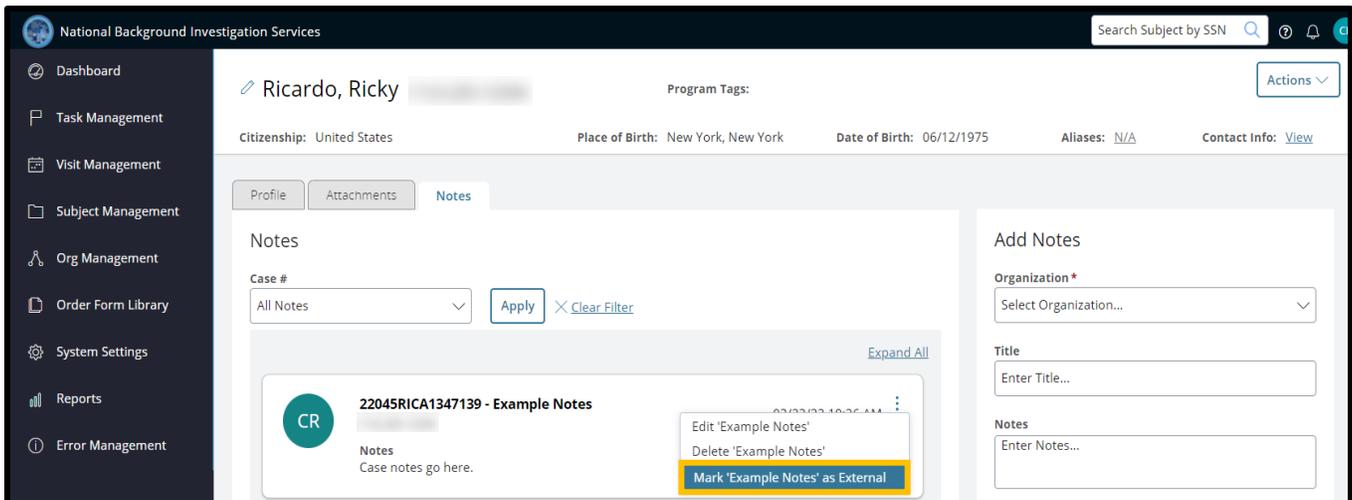
6. To delete a note, select the **Delete** option from the ellipses.  
**Note:** Users can only delete notes they have entered.



7. A confirmation modal will appear to delete the note. Select the **Delete** button.  
**Note:** Users can only delete notes they have entered.



8. To make a note available to all organizations and user roles in the NBIS system who can view the subject's profile, select the **Mark External** option.  
**Note:** Marking a note as external makes it visible to organizations not affiliated with the subject.



9. A confirmation modal will appear to mark the note as external. Select the **Confirm** button to complete the action.

The screenshot displays the National Background Investigation Services (NBIS) web application. The main content area shows the profile of 'Ricardo, Ricky' with fields for Citizenship (United States), Place of Birth (New York, New York), Date of Birth (06/12/1975), Aliases (N/A), and Contact Info (View). A success message at the top indicates 'Success. Edits to note have been saved.' Below this, the 'Notes' tab is active, showing a list of notes with a filter set to 'All Notes'. A modal dialog titled 'Confirm Making Note External' is overlaid on the screen, containing the text: 'Making note 'Example Notes' External will allow the note to be viewed by users outside of Defense Counterintelligence and Security Agency. Please confirm making 'Example Notes' External.' The modal has 'Cancel' and 'Confirm' buttons, with the 'Confirm' button highlighted by a yellow box.

