

## AUTHORIZE A CASE REQUEST

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Purpose: To demonstrate how to search, reassign and authorize a case from Task Management. As well as CV enrollment and how case can be returned to a Reviewer.

## AUTHORIZE A CASE REQUEST

The Authorization workflow allows users with the Authorizer user role to review the case details, review and input or confirm **Financial Details**, and take authorization action on cases.

The **Financial Details** tab may have been populated during the **Review** phase by the **Reviewer** if the **Reviewer** also has the **Authorizer** role. If not, the user will have to search for, reassign, and take action on the task.

How to Search for a Task from Task Management

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	Subject Management	My V	Vork															
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	-)	MI-4E	-DCSA-74		Va	alidating		27				12/22/21						
oti	Reports	21356	5JOEB1211040		Aw Su	vaiting Subject Jbmission		27				1/6/22		Joe				
	Error Management	22017	7GREE1115249		Aw Su	waiting Subject ubmission		1				1/17/22		Greene				
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1. From the Left Navigation Menu, select Task Management.

2. The tabs available to the user are dependent on the user roles granted within the system. Search for assigned tasks under **My Work** tab and unassigned tasks under **My Organization's Work** tab.

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② Dashboard	Task Management								Actions $\checkmark$
Task Management									
🗁 Visit Management	My Work My Outstanding Work	My Work My Outstanding Work My Team's Work My Organization's Work My Organization's Outstanding Work History							
Subject Management	My Work								_
人 Org Management	Search My Work								_
Order Form Library								Table Settings ~	Table View 🗸
	Task ID	Case Type	Status	\Xi Task Age (days	) \Xi Urgency	\Xi Task Assignment Date	\Xi Last Name	Priority	17
	MI-4E-DCSA-74		Validating	27		12/22/21			
01 Reports	21356JOEB1211040		Awaiting Subject Submission	27		1/6/22	Joe		
<ol> <li>Error Management</li> </ol>	22017GREE1115249		Awaiting Subject Submission	1		1/17/22	Greene		
	MI-DOD-DSM1-6		Processing	1		1/17/22			
				100 1					

- 3. Type the subject's last name or SSN in the **Search** text field box.
- 4. Select the **Magnifying glass** to execute the search.

National Background Inve	estigation Services					Search Subject by SSN 🔍 🗘 🕅
Ø Dashboard	Task Management					Actions V
Task Management						Reassign Tasks
📅 Visit Management	My Work My Outstanding Work My Team's Work	My Organization's Worl	k My Organization's Outstandin	g Work History		
Subject Management	My Organization's Work					⊖ <u>Refresh</u>
入 Org Management	Organization		•			
Order Form Library	All Associated Organizations	Search My Org's Work	Include All Unassigned Tas	ks		
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	Task ID	Case Type 🔤	Status =	Task Age (days)	Task Assignment Date	Last Name
dij Reports	21179BUCK1602277		Initiation	204	11/10/21	Buckinowski
<ol> <li>Error Management</li> </ol>	21182BRID1200195		Initiation	201	11/10/21	Bridgerton
	21193ROCK1114031		Pending Initiator Action	191	11/10/21	Rocket
	21194LOWH0652445		Pending Initiator Action	190	11/10/21	Low
	21196WHIT0728292		Pending Initiator Action	188	11/10/21	White
	21196POWE1310156		Pending Initiator Action	187	11/10/21	Powell
	21207BREW0635590		Pending Initiator Action	177	11/10/21	Brewster
	21208BLUE1633214		Pending Initiator Action	175	11/10/21	Blue
	21210BLAC1607176		Pending Initiator Action	173	11/10/21	Black
	21228CHEE0810491		Pending Initiator Action	156	11/10/21	Cheesestick
	21186FOXM1206093		Awaiting Subject Submission	197	11/10/21	Fox

Authorize: How to Reassign a Task from Task Management

- 1. Navigate to the **Task Management** page from the Left Navigation Menu.
- 2. Select My Organization's Work to search for the required task(s) to reassign.

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Task Management											
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al Penorts	All Associated Organizations V Search My Org's Work Q Include All Unassigned Tasks										
	Table Settings $\vee$	Table View 🗸									
	Case ID	Case Type 👳	Last Name 📃	Status	\Xi Task Age (Days) 📃	Last Updated	Assigned To	=			
	21286TRIB1351035 -	cv	Tribbianni	Received	117	10/14/21					
	21287MINA0924139 -	CV	Mina	Received	117	10/14/21					
	21287WAYN1047277 -	CV	Wayne	Received	113	10/18/21					
	21287STAT1115114 -	CV	StateFarm	Received	70	11/30/21					
	21341MUNN1542323 -	CV	Munns	Received	55	12/14/21					
	21341PERI1542294 -	CV	Perin	Received	55	12/14/21					
	213410LDR1542289 -	CV	Oldroyd	Received	55	12/14/21					
	21337KORA1639438 -	CV	Korando	Received	55	12/14/21					
	21341VANH1542342 -	CV	Vanheusen	Received	55	12/14/21					
	21341KLUS1542359 -	CV	Klusman	Received	55	12/14/21					
	21337K0RA1639438 CV Korando Received 55 12/14/21					12/14/21					
	21271/MINA1656031 Tier 5 Mina Received 132 9/28/21										
	21271ANES1558430	CV Case	Anesh	Received	132	10/14/21					

- 3. Select the check box to Include All Unassigned Tasks.
- 4. From the Actions drop-down, select Reassign Task.

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Task Management	0					Reassign Tasks
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		ing organizations from		s		Option
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人 Org Management	Organization			-		
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System Settings	Task ID	Case Type	Status	Task Age (days)	Task Assignment Date	Last Name =
dl Reports	21170BLICK1602277		Initiation	231	11/10/21	
(i) Error Management	2118288001200195		Initiation	228	11/10/21	Bridgerton
() <b>)</b>	2110200133		Reading total states	220	11/10/21	Deduct
	21193ROCK1114031		Pending Initiator Action	217	11/10/21	Rocket
	21194LOWH0652445		Pending Initiator Action	217	11/10/21	Low
	21196WHIT0728292		Pending Initiator Action	215	11/10/21	White
	21196POWE1310156		Pending Initiator Action	214	11/10/21	Powell
	21207BREW0635590		Pending Initiator Action	204	11/10/21	Brewster
	21208BLUE1633214		Pending Initiator Action	202	11/10/21	Blue
	21210BLAC1607176		Pending Initiator Action	200	11/10/21	Black
	21210DUCK1349417		Pending Initiator Action	200	11/10/21	Duck
	21186FOXM1206093		Awaiting Subject Submission	224	11/10/21	Fox

- 5. Check the box for the corresponding task(s) to reassign, then click **Reassign** at the bottom right of the screen.
- 6. When the reassign modal appears, type the name of the user to receive the case in the Reassign to User box

Rational Background Invest	igation Services						Search Subject by SSN 🔍 😗 🥂 📵
② Dashboard	My Work My O	utstanding Work My Team's Work My Organization's Work	My Organization's Outstanding Work History				<b>^</b>
Task Management	My Organizat	ion's Work					C Refresh
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人 Org Management							Table Settings 🗸 Table View 🗸
C) Order Form Library	Selected Items	😇 Task ID	Case Type	😇 Status	😇 Task Age (days)	Task Assignment Date	😇 Last Name 😇
		21186F0XM1206093		Awaiting Subject Submission	224	11/10/21	Fox
③ System Settings		21203BURK1344402		Pending Initiator Action	207	11/10/21	Burke
ill Reports		211825COT1443147	Tier 3	Received	228	11/10/21	Scott
Error Management		21187BALL0951396	Tier 3	Received	224	11/10/21	Bell
		212945HEP1010327	Tier 3	Received	117	11/10/21	Sheppard
		21357GREE0158258	Tier 3	Authorization	54	2/2/22	Greene
		22019FRAN0638376		Awalting Subject Submission	27	2/3/22	Francis
		21056CHAN1715526	Tier 2	Received	228	2/3/22	Chand
		22021CHAN1636469		Awaiting Subject Submission	24	2/5/22	Chand
		220075LOA1211203		Awaiting Subject Submission	38	2/6/22	Sloan
		22030GREE2050117	Tier 4	Authorization	15	2/8/22	Greene
		22040GAIN1529377	Tier 3	Review - Pending eApp	5	2/9/22	Gains
		22041HANN1453562		Awaiting Subject Submission	4	2/10/22	Hannigan
		220425MIT0548418	Tier 3	Review - Pending eApp	4	2/11/22	Smith
		22042FREE1449324		Awaiting Subject Submission	3	2/11/22	Freezing
		22042HUD51357241		Review - eApp Received	3	2/14/22	Hudson
	Cancel						Reassign

8. The task will now be available to the user who received the task in their **My Work** tab.

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Task Management												
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C Order Form Library			Reassignment 👳	Task ID	Case type	<u></u> ≡ ssi	N (last 4)	<b>╤</b> Status	\Xi Last Name	Ē	Table Settings 🗸 Table	<u>View</u> ~
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til Reports	2	21187SMI	Ready	21251STEV1558055	Tier 3	12	34	Received	Stevens		Smithers	
(i) Error Management	2	1251STE	Unassigned								Stevens	
	2	1251TOR	Reassign to User*			_					Torres	
	Cancel		Select a User								Rea	assign
										Submit		
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**NOTE:** This process can be completed in any tab available to the user within **Task Management**.

Authorize: How to Authorize the Case Submission Details

1. Select the **Financial Details** tab and input the necessary information.

National Backgro	und Investigation Services			Search Subject	by SSN 🔍 🕢 🖓 🔍
② Dashboard	Greene, Rachel	Program Tags:		Actions $\lor$	Close
Task Managemen	t Citizenship: United States	Place Of Birth: United States	Date Of Birth: 06/16/1999	Aliases: N/A Conta	ict Info: <u>View</u>
🔄 Visit Management					4
🗋 Subject Managem	nt SF85P Status: AUTHORIZATION 02/04/2022				✓ Expand
പ്പ് Org Management	Select a Template Select a Template 🗸				-
Crder Form Librar	r				
System Settings	Routing Details 🗸 Position	Details 🗸 Optional Coverage 🗸	Review 🗸	Financial Details *	
네] Reports	Financial Details				
Error Managemen	SON & SOI				
	Submitting Office Number (SON)*	Security Office Identifier (SOI)*			
	Financial Information				
	Intra-Governmental Payment and Collection (IPAC) or A	zency Location Code (ALC)*	Obligating Document Number		
	Business Event Type Code (BETC) Select		Accounting Data and/or Organization Case Number		*

- Authorizers can take three primary actions on a case from the Authorizer Workspaces: Returning to Reviewer, Holding the Authorization, or Releasing (Authorizing) the Case.
  - a) If the Authorizer finds that some fields must be corrected by a Reviewer, select **Return to** Review to return the case to the Reviewer. Provide a reason for the **Return to Review** in the modal. The case will return to the queue for reassignment and updates.
  - b) The Authorizer can place the case request on hold for any reason by selecting the **Actions** drop-down menu and selecting **Hold Authorization**. A comment is required to explain the reason for the hold.

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⊘ Da	ishboard	Greene, Rachel 1	Progra	m Tags:			Actions $\lor$	Close
Ta:	sk Management	Citizenship: United States	Place Of Birth: Unit	ed States	Date Of Birth: 06/16/1999	Aliase	Refresh History	t Info: <u>View</u>
🗁 Vis	sit Management						Hold Authorization	
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_%, Οη	g Management	Select a Template Select a Template 🗸					Rebuild SF Archival Copy Cancel Submission	
🗋 Ori	der Form Library						Manage Attachments	
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<sub>0</sub> i) Rej	ports	Financial Details						
() Err	ror Management	SON & SOI						
		Submitting Office Number (SON) *	Security Offi	ce Identifier (SOI) *				
		Intra-Governmental Payment and Collecti 4321	ion (IPAC) or Agency Location Code (ALC) *		Obligating Document Number			
		Business Event Type Code (BETC) Select			Accounting Data and/or Organization Case Number			

- c) Once all fields are correct and the case is ready to be released, the Authorizer selects **Release Submission** to release the case request and authorize funds for the investigation. The **Release Submission** activity completes the Authorizer workflow on the case.
- d) Users can view or download the PDF form of the SF attachment to check for accuracy. The PDF is located at the bottom of the screen, it can be viewed by selecting the blue hyperlink, or downloaded by selecting the icon to the right of the hyperlink.

National Background Inve	stigation Services			s	earch Subject by SSN 🔍 🕘 🗘 🔍
② Dashboard	Greene, Rachel	Program Tags:		Ì	Actions > Close
Task Management	Citizenship: United States	Place Of Birth: United States	Date Of Birth: 06/16/1999	Aliases: <u>N/A</u>	Contact Info: <u>View</u>
🗁 Visit Management	Select V				
Subject Management	Treasury Account Symbol (TAS)				
人 Org Management	Sub-level Prefix Code	Allocation Transfer Organization ID	Agency I	Identifier*	
Drder Form Library				]	
③ System Settings	Beginning Period of Availability	Ending Period of Availability	Availabi Select	lity Type Code	
III Reports	Main Account Code *	Sub Account Code*	L		
(j) Error Management					
	SF Attachment				
	SFArchivalCopy.pdf 🛓				
	I have reviewed this request and authorize its release.*				
	Cancel			Save Return To Re	eview Release Submission

Authorize: Continuous Vetting Enrollment for DOD Organizations

Case requests on behalf of the DOD that are CE eligible require extra steps to be completed. The Authorizer must complete the information under the Release and Financial Details tabs and make a case routing decision.

- 1. Review the case details and edit if necessary.
- 2. Select the **Release tab** to advance to that section.

National Background Inves	stigation Services					Search Subject by SSN 🔍 🕘 🔎 🖙
Ø Dashboard	Kornikova, Anna		Program Tags:			Actions V Close
Task Management	Citizenship: Finland		Place Of Birth: Finland	Date Of Birth: 03/04/1955	Aliases: N/A	Contact Info: View
📰 Visit Management						
Subject Management	SF86 Status: AUTHORIZATION	02/16/2022				✓ Expand
人 Org Management	Routing Details 🗸	Position Details 🗸	Optional Coverage 🗸	Review 🗸	Financial Details *	Release *
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III Reports	Case Routing Decision					
Error Management	The system has reviewed the case	and suggests routing to Continuou	us Evaluation			
	Section					
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	Current routing is set to: Continuo	us Vetting Change				
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	SFArchivalCopy.pdf	±.				
	I have reviewed this request	and authorize its release.*				
	Cancel				Save Return T	o Review Release Submission

- 3. A system generated Case Routing Decision is then provided.
- 4. If the routing decision in incorrect, select Change.

National Background Inve	stigation Services					Search Subject by SSN 🔍 🎯 🕫 🖙
② Dashboard	Kornikova, Anna		Program Tags:			Actions V Close
Task Management	Citizenship: Finland		Place Of Birth: Finland	Date Of Birth: 03/04/1955	Aliases: N/A	Contact Info: View
📅 Visit Management						*
Subject Management	SF86 Status: AUTHORIZATION	02/16/2022				✓ Expand
ሌ Org Management	Routing Details 🗸	Position Details 🗸	Optional Coverage 🗸	Review 🗸	Financial Details *	Release *
Order Form Library	Release Details					
③ System Settings						
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Error Management	The system has reviewed the case	and suggests routing to Continuou:	s Evaluation			
	Section					
	No items					
	Note: Please ensure this user is in D	ISS prior to enrolling to Continuous Ver	tting			
	Current routing is set to: Continue	ous Vettin Change				
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	I have reviewed this request	t and authorize its release.*				
	Cancel				Save Return Te	Release Submission

5. A reason must be given for changing the routing submission, then select **Submit.** 

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Ē	Visit Management	Citizensnip: Finland	Place Of Birth: Filliand	Date	e of Birth: 05/04/1955	Anases: <u>IV/A</u>	Contact into: <u>view</u>
	Subject Management	SF86 Status: AUTHORIZATION 02/16/2022					✓ Expand
л	Org Management	During During (	with (	n d Duinu d	Second Date	in the second second	
0	Order Form Library	Routing Details	etalis 🗸 Optional Covera	ge 🗸 🔋 Keview 🗸	Financiai Deta	nis * Releas	.e ^
	Order Form Library	Release Details					
٩	System Settings	Case Routing Decision	Routing Cha Review the following	nge g routing changes and provide a reason	for this update.		
ıtl	Reports	The system has reviewed the case and suggests ro	System recomme	nded routing is: Continuous Vetting set to: Continuous Vetting			
0	Error Management		Reason	Set to Continuous reamy			
		Section					
		No items					
		Note: Please ensure this user is in DISS prior to enroll	ing to Continuous Vetting				
		Current routing is set to: Continuous Vetting	ange		Submit		
	SF Attachment						
		I have reviewed this request and authorize	its release.*				
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		Cancel				Save Return To Review	Release Submission

- 6. Verify the new routing decision by checking the box next to the authorization statement.
- 7. Select **Release Submission** to release this case request for investigation.

•	National Background Inve	stigation Services					Search Subject by SSN 🔍 🗿 🗘 🕫	CR
۵	Dashboard	Kornikova, Anna		Program Tags:			Actions >> Close	
	Task Management	Citizenship: Finland		Place Of Birth: Finland	Date Of Birth: 03/04/1955	Aliases: N/A	Contact Info: View	
	Visit Management							4
C	Subject Management	SF86 Status: AUTHORIZATION	02/16/2022				✓ Expand	1
ጼ	Org Management	Routing Details 🗸	Position Details 🗸	Optional Coverage 🗸	Review 🗸	Financial Details *	Release *	
D	Order Form Library	Release Details						
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ıd	Reports	Case Routing Decision						
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		SFArchivalCopy.pdf						
		I have reviewed this request and authorize its release.*						
		Cancel				Save Return To	Review Release Submission	+

Authorize: Return to Reviewer

The case must be returned to the Reviewer for updates if the Authorizer find fields that need corrections.

1. Select **Return to Review** on the Financial Details screen.

National Backgro	ound Investigation Services				Search Subject by SSN 🔍 🕐 🕼				
Ø Dashboard	Kornikova, Anna	Program Tags:			Actions >> Close				
Task Manageme	nt Citizenship: Finland	Place Of Birth: Finland	Date Of I	Birth: 03/04/1955 Ali	ases: <u>N/A</u> Contact Info: <u>View</u>				
📰 Visit Management									
🗋 Subject Managem	ent SF86 Status: AUTHORIZATION 02/16/2022				✓ Expand				
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D Order Form Libra	y Release Details								
System Settings									
III Reports	Case Routing Decision								
(i) Error Managemer	The system has reviewed the case and suggests	The system has reviewed the case and suggests routing to Continuous Evaluation							
c î	Section	Section							
	No items	No items							
	Note: Please ensure this user is in DISS prior to enro	Note: Please ensure this user is in DISS prior to enrolling to Continuous Vetting							
	Current routing is set to: Continuous Vetting Change								
	SF Attachment								
	SFArchivalCopy.pdf								
	I have reviewed this request and authorize its release.•								
	Cancel			Sa	Return To Review Release Submission				

- 2. Select **Submit** to finalize the process.
- 3. The case status will show **Returned from Authorizer** after the case is returned to review.

Rational Background inve	ntigation Services				Search Subject by 354 🔍 👌 🧬 😒
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<ul> <li>Task Management</li> </ul>	Colorada United States	Mana of Birds: United States	Data of Birds: 05/15/1978	Alasen 313	Contact today 12mm
🗈 Volt Management	Seat. v				
Subject Management					
Å Og Management	Treasury Account symbol (TAS) tablevel India Cale	Return To Review	×	a linether*	
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d Reports	Main Account Culu <sup>4</sup>	1			
Ensr Management	HN .				
	SF Attachment				
	Starthouldays pell	Cancel	Submit		
	I have reviewed this request and authorize its release.»				
	Canad			Site Arturn It	Brine Education

<u>Note:</u> If you have a multi-role persona, the user will select the **Back To Review** button to change the status to **Returned from Authorizer**. The user does not need to provide the reason for returning. The case will stay within your work list. You can continue working on the case as the Reviewer.

