



## AUTHORIZE A CASE REQUEST

### TABLE OF CONTENTS

**AUTHORIZE A CASE REQUEST**..... **Error! Bookmark not defined.**  
**AUTHORIZE: HOW TO REASSIGN A TASK FROM TASK MANAGEMENT** ... **Error! Bookmark not defined.**  
**AUTHORIZE: HOW TO AUTHORIZE THE CASE SUBMISSION DETAILS** ..... **Error! Bookmark not defined.**  
**AUTHORIZE: CONTINUOUS VETTING ENROLLMENT FOR DOD ORGANIZATIONS** **Error! Bookmark not defined.**  
**AUTHORIZE: RETURN TO REVIEWER**..... **Error! Bookmark not defined.**

**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

1. From the Left Navigation Menu, select **Task Management**.

The screenshot shows the NBIS Task Management interface. The left navigation menu includes: Dashboard, Task Management (highlighted), Visit Management, Subject Management, Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Task Management' and has an 'Actions' dropdown. Below the title are tabs for 'My Work', 'My Outstanding Work', 'My Team's Work', 'My Organization's Work', 'My Organization's Outstanding Work', and 'History'. The 'My Work' tab is active, showing a search box and a table of tasks.

Task ID	Case Type	Status	Task Age (days)	Urgency	Task Assignment Date	Last Name	Priority
<a href="#">MI-4E-DCSA-74</a>	---	Validating	27	---	12/22/21	---	---
<a href="#">21356/OEB1211040</a>	---	Awaiting Subject Submission	27	---	1/6/22	Joe	---
<a href="#">22017GREE115249</a>	---	Awaiting Subject Submission	1	---	1/17/22	Greene	---
<a href="#">MI-DOD-DSM1-6</a>	---	Processing	1	---	1/17/22	---	---

- 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.

The screenshot shows the 'Task Management' page in the National Background Investigation Services system. The 'My Work' tab is selected and highlighted with a yellow box. Below the tabs, there is a search field labeled 'Search My Work' with a magnifying glass icon. A table displays the following data:

Task ID	Case Type	Status	Task Age (days)	Urgency	Task Assignment Date	Last Name	Priority
ML4EDCSA-74	---	Validating	27	---	12/22/21	---	---
21356JQEB1211040	---	Awaiting Subject Submission	27	---	1/6/22	joe	---
22017GRFE1115249	---	Awaiting Subject Submission	1	---	1/17/22	Greene	---
MLDOD-DSM1-6	---	Processing	1	---	1/17/22	---	---

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

The screenshot shows the 'Task Management' page with the 'My Organization's Work' tab selected and highlighted with a yellow box. Below the tabs, there is a search field labeled 'Search My Org's Work' with a magnifying glass icon. A dropdown menu is set to 'All Associated Organizations'. A table displays the following data:

Task ID	Case Type	Status	Task Age (days)	Task Assignment Date	Last Name
21179BUCK1602277	---	Initiation	204	11/10/21	Buckinowski
21182BRID1200195	---	Initiation	201	11/10/21	Bridgerton
21193ROCK1114031	---	Pending Initiator Action	191	11/10/21	Rocket
21194QWH0652445	---	Pending Initiator Action	190	11/10/21	Low
21196WHT0728292	---	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
21208BLUF1633214	---	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	Cheestick
21186FOXMI206093	---	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.

The screenshot shows the 'Task Management' interface for 'National Background Investigation Services'. The left navigation menu is visible, with 'Task Management' highlighted. The main content area is titled 'My Organization's Work' and includes a search bar and a table of tasks. The 'Include All Unassigned Tasks' checkbox is currently unchecked.

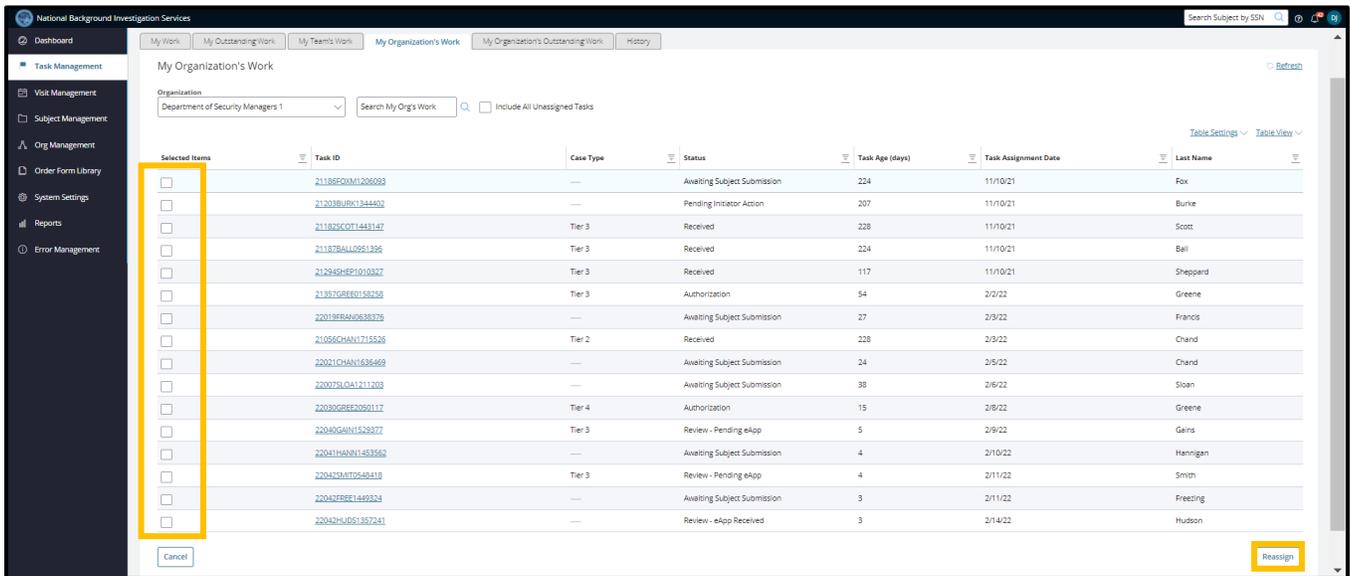
Case ID	Case Type	Last Name	Status	Task Age (Days)	Last Updated	Assigned To
<a href="#">21286TRB1351035</a>	CV	Tribbianni	Received	117	10/14/21	
<a href="#">21287MINA0924139</a>	CV	Mina	Received	117	10/14/21	
<a href="#">21287WAYN1047277</a>	CV	Wayne	Received	113	10/18/21	
<a href="#">21287STAT1115114</a>	CV	StateFarm	Received	70	11/30/21	
<a href="#">21341MUNN1542323</a>	CV	Munns	Received	55	12/14/21	
<a href="#">21341PERI1542294</a>	CV	Perin	Received	55	12/14/21	
<a href="#">21341OLDRI1542289</a>	CV	Oldroyd	Received	55	12/14/21	
<a href="#">21337KORA1639438</a>	CV	Korando	Received	55	12/14/21	
<a href="#">21341VANH1542342</a>	CV	Vanheusen	Received	55	12/14/21	
<a href="#">21341KLUS1542359</a>	CV	Klusman	Received	55	12/14/21	
<a href="#">21337KORA1639438</a>	CV	Korando	Received	55	12/14/21	
<a href="#">21271MINA1656031</a>	Tier 5	Mina	Received	132	9/28/21	
<a href="#">21271ANES1558430</a>	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**.

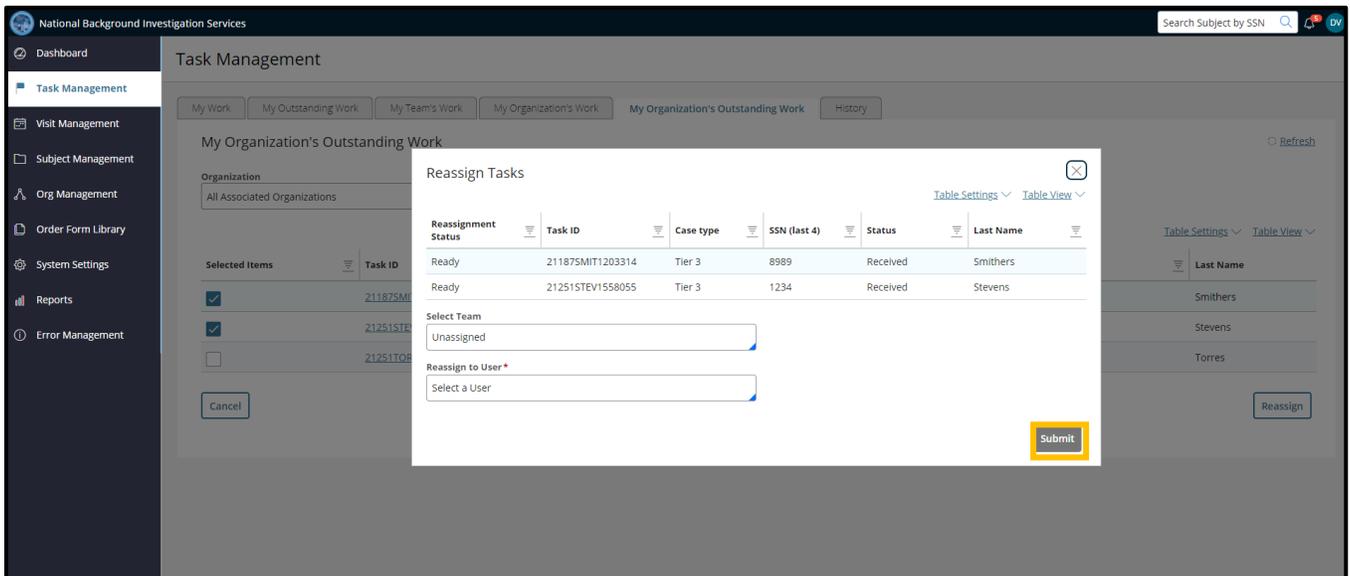
The screenshot shows the 'Task Management' interface for 'National Background Investigation Services'. The left navigation menu is visible, with 'Task Management' highlighted. The main content area is titled 'My Organization's Work' and includes a search bar and a table of tasks. The 'Include All Unassigned Tasks' checkbox is now checked. The 'Actions' dropdown menu is open, and 'Reassign Tasks' is selected.

Task ID	Case Type	Status	Task Age (days)	Task Assignment Date	Last Name
<a href="#">21179BUCK1602272</a>	---	Initiation	231	11/10/21	Buckinowski
<a href="#">21182BRID1200195</a>	---	Initiation	228	11/10/21	Bridgerton
<a href="#">21193ROCK1114031</a>	---	Pending Initiator Action	217	11/10/21	Rocket
<a href="#">21194OWH0652445</a>	---	Pending Initiator Action	217	11/10/21	Low
<a href="#">21196WHIT0728292</a>	---	Pending Initiator Action	215	11/10/21	White
<a href="#">21196POWE1310156</a>	---	Pending Initiator Action	214	11/10/21	Powell
<a href="#">21207BREW0635590</a>	---	Pending Initiator Action	204	11/10/21	Brewster
<a href="#">21208BLUE1633214</a>	---	Pending Initiator Action	202	11/10/21	Blue
<a href="#">21210BLAC1607176</a>	---	Pending Initiator Action	200	11/10/21	Black
<a href="#">21210DUCK1349417</a>	---	Pending Initiator Action	200	11/10/21	Duck
<a href="#">21186FOX1206093</a>	---	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



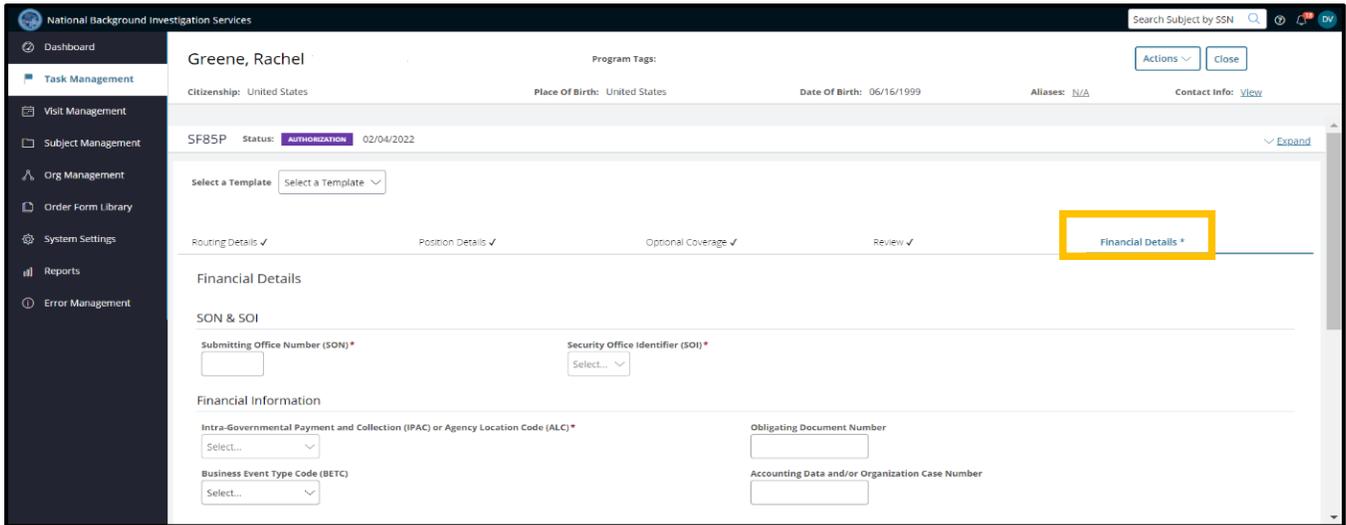
8. The task will now be available to the user who received the task in their **My Work** tab.



**NOTE:** This process can be completed in any tab available to the user within **Task Management**.

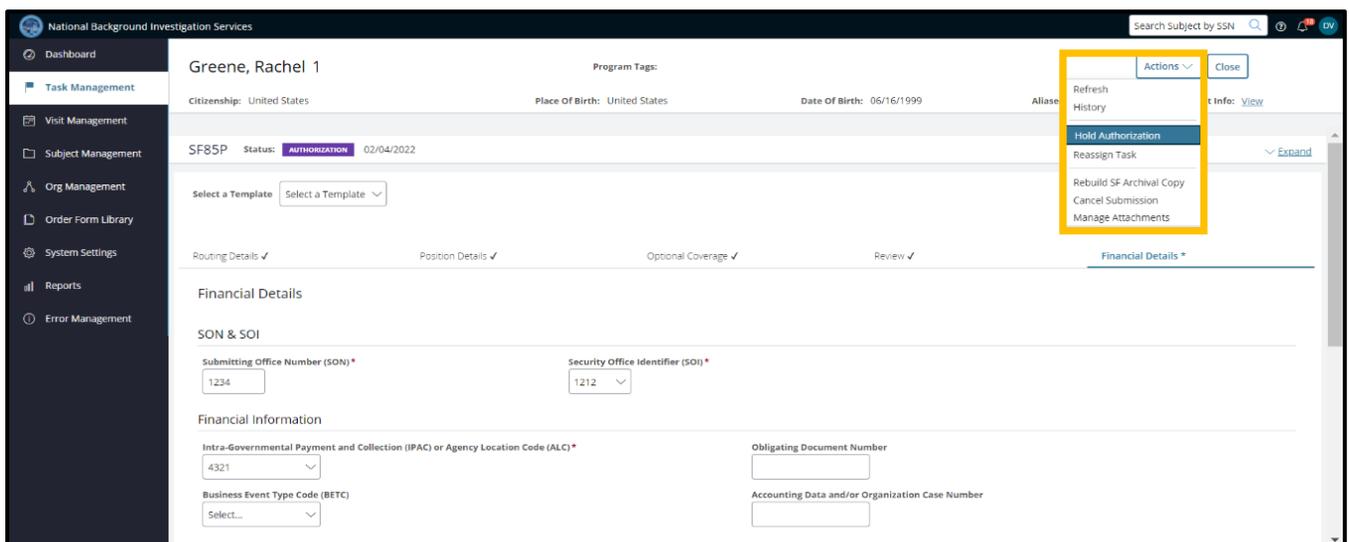
# Authorize: How to Authorize the Case Submission Details

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



2. 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.



- 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 Investigation Services

Search Subject by SSN

Greene, Rachel

Program Tags: [Actions] [Close]

Citizenship: United States Place Of Birth: United States Date Of Birth: 06/16/1999 Aliases: N/A Contact info: [View](#)

Select...

Treasury Account Symbol (TAS)

Sub-level Prefix Code	Allocation Transfer Organization ID	Agency Identifier *
Beginning Period of Availability	Ending Period of Availability	Availability Type Code
Main Account Code *	Sub Account Code *	Select...

SF Attachment

[SFArchivalCopy.pdf](#)

I have reviewed this request and authorize its release.

[Cancel] [Save] [Return To Review] [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.

The screenshot displays the National Background Investigation Services (NBIS) interface. The top navigation bar includes 'Dashboard', 'Task Management', 'Visit Management', 'Subject Management', 'Org Management', 'Order Form Library', 'System Settings', 'Reports', and 'Error Management'. The main content area shows details for 'Kornikova, Anna' with fields for Citizenship (Finland), Place Of Birth (Finland), Date Of Birth (03/04/1955), Aliases (N/A), and Contact Info (View). Below this, the case ID 'SF86' is shown with a status of 'AUTHORIZATION' and a date of '02/16/2022'. A horizontal menu contains several tabs: 'Routing Details', 'Position Details', 'Optional Coverage', 'Review', 'Financial Details', and 'Release +'. The 'Release +' tab is highlighted with a yellow border. Below the tabs, the 'Release Details' section is visible, including a 'Case Routing Decision' where the system suggests routing to Continuous Evaluation. A note states: 'Please ensure this user is in DISS prior to enrolling to Continuous Vetting'. The current routing is set to 'Continuous Vetting' with a 'Change' button. An 'SF Attachment' section shows a file named 'SFArchivalCopy.pdf'. At the bottom, there is a checkbox labeled 'I have reviewed this request and authorize its release.' and buttons for 'Cancel', 'Save', 'Return To Review', and 'Release Submission'.

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

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

Kornikova, Anna

Program Tags: [Actions] [Close]

Citizenship: Finland Place Of Birth: Finland Date Of Birth: 03/04/1955 Aliases: N/A Contact Info: View

SF86 Status: AUTHORIZATION 02/16/2022 [Expand]

Routing Details ✓ Position Details ✓ Optional Coverage ✓ Review ✓ Financial Details + [Release \*]

Release Details

Case Routing Decision

The system has reviewed the case and suggests routing to Continuous Evaluation

Section

No items

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 [Download]

I have reviewed this request and authorize its release.\*

[Cancel] [Save] [Return To Review] [Release Submission]

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

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

Kornikova, Anna

Program Tags: [Actions] [Close]

Citizenship: Finland Place Of Birth: Finland Date Of Birth: 03/04/1955 Aliases: N/A Contact Info: View

SF86 Status: AUTHORIZATION 02/16/2022 [Expand]

Routing Details ✓ Position Details ✓ Optional Coverage ✓ Review ✓ Financial Details + [Release \*]

Release Details

Case Routing Decision

The system has reviewed the case and suggests routing to Continuous Evaluation

Section

No items

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 [Download]

I have reviewed this request and authorize its release.\*

[Cancel] [Save] [Return To Review] [Release Submission]

Routing Change

Review the following routing changes and provide a reason for this update.

System recommended routing is: Continuous Vetting  
Current routing is set to: Continuous Vetting

Reason

[Submit]

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.

The screenshot displays the 'National Background Investigation Services' web application. The main header shows the subject's name, 'Kornikova, Anna', and various details: Citizenship: Finland, Place Of Birth: Finland, Date Of Birth: 03/04/1955, Aliases: N/A, and Contact Info: View. The case ID is SF86, with a status of AUTHORIZATION and a date of 02/16/2022. The interface includes a navigation sidebar on the left with options like Dashboard, Task Management, Visit Management, Subject Management, Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Release Details' and contains a 'Case Routing Decision' section. This section states: 'The system has reviewed the case and suggests routing to Continuous Evaluation'. Below this, there is a 'Section' header with 'No items' listed. A note reads: 'Note: Please ensure this user is in DISS prior to enrolling to Continuous Vetting'. The current routing is set to 'Continuous Vetting', with a 'Change' button. Under 'SF Attachment', there is a file named 'SFArchivalCopy.pdf'. At the bottom of the page, there are three buttons: 'Cancel', 'Save', and 'Return To Review'. The 'Release Submission' button is highlighted with a yellow border.

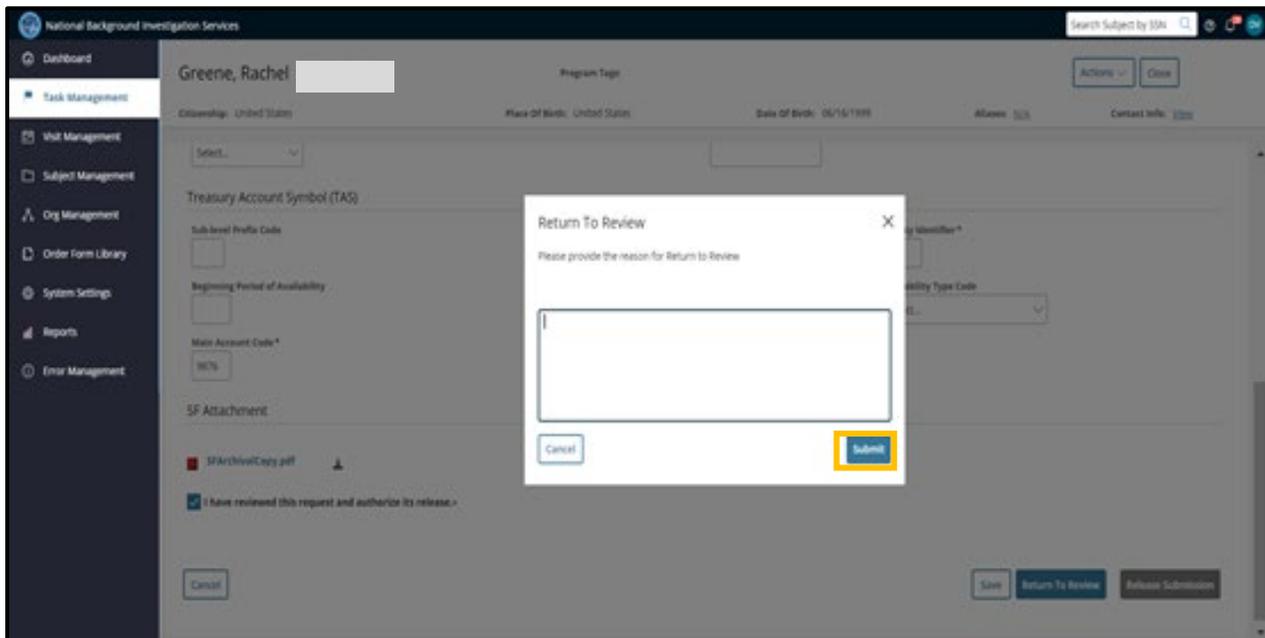
## Authorize: Return to Reviewer

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.

The screenshot displays the NBIS interface for a subject named Anna Kornikova. The left sidebar contains navigation options: Dashboard, Task Management (selected), Visit Management, Subject Management, Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area shows the subject's details: Citizenship: Finland, Place Of Birth: Finland, Date Of Birth: 03/04/1955, Aliases: N/A, and Contact Info: View. Below this, the case ID SF86 is shown with a status of AUTHORIZATION and a date of 02/16/2022. A progress bar indicates the status of various sections: Routing Details ✓, Position Details ✓, Optional Coverage ✓, Review ✓, Financial Details \*, and Release \*. The 'Release Details' section includes a 'Case Routing Decision' where the system suggests routing to Continuous Evaluation. A note states: 'Please ensure this user is in DISS prior to enrolling to Continuous Vetting'. The current routing is set to 'Continuous Vetting' with a 'Change' button. Under 'SF Attachment', there is a file named 'SFArchivalCopy.pdf'. At the bottom, there is a checkbox for 'I have reviewed this request and authorize its release.' and a 'Cancel' button. The bottom right corner features three buttons: 'Save', 'Return To Review' (highlighted in yellow), and '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.



Note: 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.

