



## REVIEW A CASE REQUEST

### TABLE OF CONTENTS

<b>REVIEW A CASE REQUEST.....</b>	<b>1</b>
HOW TO SEARCH FOR A TASK FROM TASK MANAGEMENT.....	1
REVIEW: HOW TO REASSIGN A TASK FROM THE TASK MANAGEMENT PAGE.....	3
REVIEW: REVIEW THE SUBMISSION DETAILS.....	6
HOW TO REQUEST A SUBMISSION.....	9

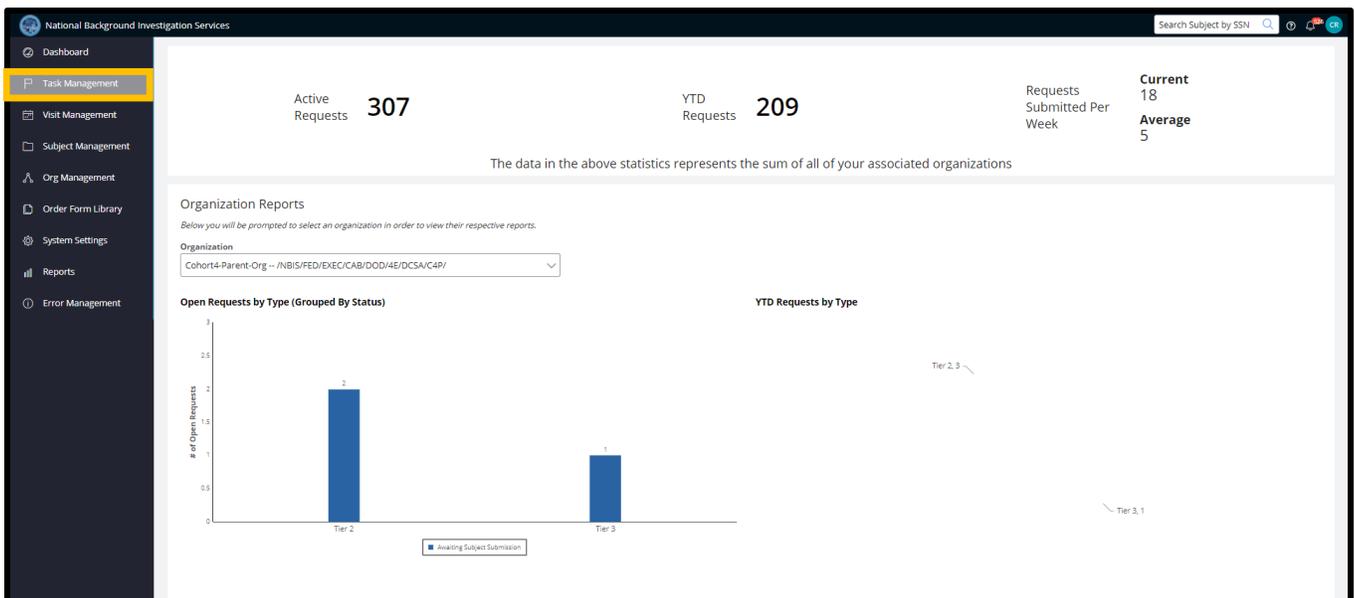
**Purpose:** Learn how to review a case request, the second step in the Initiate, Review, and Authorize process.

## REVIEW A CASE REQUEST

### How to Search for a Task from Task Management

1. Select **Task Management** from the Left Navigation Menu to navigate to the Task inbox.

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



2. Enter the subject's last name or Social Security number in the Search box.
3. Select the **magnifying glass** to execute the search.

Organization: All Associated Organizations   Include All Unassigned Tasks

Case ID	Case Type	Last Name	Status	Task Age (Days)	Last Updated	Assigned To
<a href="#">21286TRIB1351035-</a>	CV	Tribbianni	Received	117	10/14/21	Bradley Eden
<a href="#">21287MINA0924139-</a>	CV	Mina	Received	117	10/14/21	Bradley Eden
<a href="#">21287WAYN1047277-</a>	CV	Wayne	Received	113	10/18/21	David Reese
<a href="#">21287STAT1115114-</a>	CV	StateFarm	Received	70	11/30/21	May Wang
<a href="#">21341MUNN1542323-</a>	CV	Munns	Received	55	12/14/21	David AllRoles

**Note:** The My Organization's Work tab has the option to Include All Unassigned Tasks and the My Team's Work tab has the option to Include All Sub-Teams in the results. Ensure to check the box prior to searching to include these items.

## Review: How to Reassign a Task from the Task Management Page

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

The screenshot shows the 'Task Management' interface. The left navigation menu has 'Task Management' highlighted. The main content area shows the 'My Organization's Work' tab selected. Below the tabs, there is a search bar and a table of tasks. The table has columns for Task ID, Case Type, Status, Task Age (days), Task Assignment Date, and Last Name. The tasks listed are:

Task ID	Case Type	Status	Task Age (days)	Task Assignment Date	Last Name
21013WATC1833160	---	Initiation	181	6/22/21	Watch
21013WATC1835256	---	Initiation	181	6/22/21	Watch
21056DEPO1249482	---	Initiation	138	6/22/21	Depot
21097USER0959150	---	Initiation	97	6/22/21	UserTwo
21181WHIT1505451	Tier 1	Authorization	13	6/30/21	White

3. From the Actions drop-down, select **Reassign Task**.

The screenshot shows the 'Task Management' interface with the 'My Organization's Work' tab selected. The 'Actions' drop-down menu is open, and the 'Reassign Tasks' option is highlighted. The table of tasks is visible below the search bar:

Task ID	Case Type	Status	Task Age (days)	Task Assignment Date	Last Name
21179BUCK1602277	---	Initiation	231	11/10/21	Buckinowski
21182BRID1200195	---	Initiation	228	11/10/21	Bridgerton
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

4. Check the box for the corresponding task(s) to reassign, then select **Reassign** at the bottom right of the screen.

The screenshot shows the 'Task Management' interface for 'National Background Investigation Services'. The 'My Work' tab is selected, displaying a table of tasks. Three tasks are selected, indicated by checked checkboxes in the 'Selected Items' column. The 'Reassign' button is highlighted in the bottom right corner.

Selected Items	Case ID	Case Type	Last Name ↓	Status	Task Age (Days)	Case Owner	Assigned on
<input checked="" type="checkbox"/>	21187SMIT1203314	Tier 3	Smithers	Received	393		4/4/22
<input checked="" type="checkbox"/>	21182SCOT1429575	Tier 2	Scott	Received	397		4/4/22
<input checked="" type="checkbox"/>	22090LOPE1412882	Tier 5	Lopez	Review - Pending eApp	124		4/4/22
<input type="checkbox"/>	21096CRAB1410458	Tier 1	Crab	Received	167		4/4/22
<input type="checkbox"/>	22153BROT1348194	---	Brother	Review - eApp Received	61		8/1/22
<input type="checkbox"/>	MA-25	---	---	Validating	167		4/4/22
<input type="checkbox"/>	MA-26	---	---	New	167		4/4/22
<input type="checkbox"/>	MA-29	---	---	New	160		4/4/22
<input type="checkbox"/>	MA-39	---	---	Validating	128		4/4/22
<input type="checkbox"/>	MA-40	---	---	Processing	128		4/4/22
<input type="checkbox"/>	MA-41	---	---	Validating	128		4/4/22

- When the Reassign Tasks modal appears, enter the name of the user to receive the case in the Reassign to User box.
- Select the name when it appears, then select **Submit**.

The screenshot displays the 'National Background Investigation Services' interface. The main area is titled 'Task Management' and shows a table of tasks. A modal window titled 'Reassign Tasks' is open, showing a table of tasks and a dropdown menu for 'Reassign to User\*'. The dropdown menu is highlighted with a yellow box, showing the name 'Shaun Burdick' selected. The 'Submit' button is visible at the bottom right of the modal.

Reassignment Status	Task ID	Case Type	SSN (last 4)	Status	Last Name	Assigned on
Ready	211875MIT1203314	Tier 3	8989	Received	Smithers	4/4/22
Ready	211825COT1429575	Tier 2	1111	Received	Scott	4/4/22
Ready	22090LOPE1412882	Tier 5	0066	Review - Pending eApp	Lopez	4/4/22
	21026CRA					4/4/22
	22153BRO					8/1/22
	MA-25					4/4/22
	MA-26					4/4/22
	MA-29					4/4/22
	MA-39					4/4/22
	MA-40			Processing		128 4/4/22
	MA-41			Validating		128 4/4/22

- 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.

## Review: Review the Submission Details

The Review phase begins on the Position Details tab. The details from the Routing Details tab from the Initiation phase are available in read-only view.

1. On the Position Details tab, the user can choose an order form template from the **Select a Template** drop-down menu to pre-populate required fields or manually complete all necessary information if no template is available.

The screenshot shows the NBIS interface for a submission by Rachel Greene. The left sidebar contains navigation options: Dashboard, Task Management (highlighted), Visit Management, Subject Management, Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area displays the submission details for SF85P, with a status of 'REVIEW - SAPP RECEIVED' and a date of 02/04/2022. A 'Please review this submission.' message is shown, followed by a 'Select a Template' drop-down menu. Below this, there are tabs for Routing Details, Position Details (active), Optional Coverage, Review, and Financial Details. The Position Details section includes a 'Position and Investigation Information' header and a note: 'Record information below based on output from the PDT: Position Designation Tool'. The form contains several fields: 'PDT Completed' (checkbox), 'Position Title' (text input), 'Case type' (dropdown), 'Form Type' (SF85P), 'Risk Level' (dropdown, set to Low Risk), and 'Priority Code' (dropdown).

2. Ensure all information is accurate and complete. Select **Continue** when done.  
**Note:** Changes made to the request will not change the adopted template.

The screenshot shows the NBIS interface for the same submission by Rachel Greene. The left sidebar is the same as in the previous screenshot. The main content area displays the 'Position Details' section. It includes a 'Position Details' header and a 'Deployment/Permanent Change of Station Details' section. The 'Deployment/Permanent Change of Station Details' section contains a checkbox for 'Is subject being deployed or PCSing?'. Below this is the 'Fingerprint Details' section, which includes a 'Submission Type' dropdown and a 'Transmission Method' dropdown (set to None). At the bottom of the form, there are 'Cancel', 'Save', and 'Continue' buttons. The 'Continue' button is highlighted with a yellow box.

3. Under Optional Coverage, select options for **Extra Coverage Codes**. Once complete, select **Continue**.

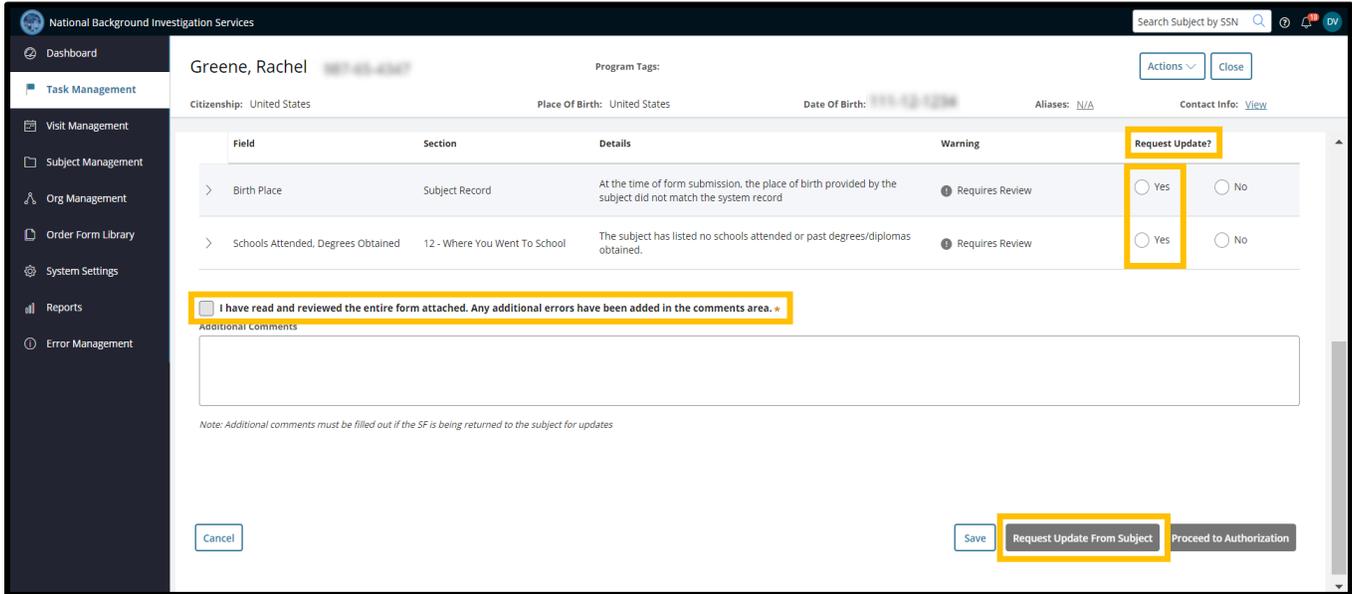
The screenshot shows the 'National Background Investigation Services' interface for subject 'Greene, Rachel'. The 'Extra Coverage Codes' section is highlighted with a yellow box, showing the 'Not needed' radio button selected. Below it is a text area for 'Special Instructions for ISP' with a 'Remaining: 250 characters' indicator. The 'Continue' button is highlighted with a yellow box.

4. The Review tab displays inconsistencies identified in the subject's e-App submission that require review and potential correction. For different non-critical errors, the Reviewer can choose to accept an error or request an update.
- To accept an error, select the **No** radio button in the Request Update column and enter any appropriate comments in the Reviewer Comments free-text field.
  - Select the checkbox next to the **"I have read..."** affirmation, provide any additional comments, and select **Proceed to Authorization**.

The screenshot shows the 'Review' tab for subject 'Greene, Rachel'. A table lists two errors with 'Request Update?' columns. The 'No' radio buttons are selected. Below the table, the checkbox 'I have read and reviewed the entire form attached...' is checked. The 'Proceed to Authorization' button is highlighted with a yellow box.

Field	Section	Details	Warning	Request Update?
> Birth Place	Subject Record	At the time of form submission, the place of birth provided by the subject did not match the system record	Requires Review	<input type="radio"/> Yes <input checked="" type="radio"/> No
> Schools Attended, Degrees Obtained	12 - Where You Went To School	The subject has listed no schools attended or past degrees/diplomas obtained.	Requires Review	<input type="radio"/> Yes <input checked="" type="radio"/> No

- c. If updates are required from the subject, select the **Yes** radio button.
- d. Select the checkbox next to the “**I have read...**” affirmation, provide any additional comments, and select **Request Update from Subject**.



- e. As a result, an automated email will be sent to the subject, instructing the subject to log into e-App to provide the requested revisions and/or additional information. The items will be listed in the email under the titles of Form Section and Warnings. After the subject has made the revisions and/or provided additional information, they will need to resubmit to the agency. Steps above are repeatable until no additional corrections from the subject are required.

**Note:** Before sending an email to the subject, the user can review the email via Email Preview.

5. Once the review is complete, the case is routed for Authorization.

**Note:** If the user’s organization cannot authorize case requests, the case will move to the authorizing organization. If the user cannot authorize case requests, the case will move to the My Organization’s Work tab under Task Management.

## How to Request a Submission

1. From the Left Navigation Menu, select **Task Management**.
2. Select the desired **hyperlink** from the Task ID column.

Task Management

My Work | My Outstanding Work | My Team's Work | My Organization's Work | My Organization's Outstanding Work | History

My Work

Search My Work

Task ID	Case Type	Status	Task Age (days)	Urgency	Task Assignment Date	Last Name	Priority
<a href="#">21182SCOT1429575</a>	Tier 2	Received	237	--	11/10/21	Scott	--
<a href="#">22010SCOT1116042</a>	Tier 3 Reinvestigation	Review - Pending eApp	44	---	1/10/22	Scott	---
<a href="#">21321YANG0956254</a>	---	Awaiting Subject Submission	98	---	1/16/22	Yang	---
<a href="#">21187SMIT1203314</a>	Tier 3	Received	232	---	1/19/22	Smithers	---
<a href="#">22046JETS1049389</a>	---	Awaiting Subject Submission	8	---	2/15/22	Jetson	---

3. From the bottom of the Review tab, select **Request Update from Subject**.

Gains, Capital

Citizenship: Guatemala | Place Of Birth: Guatemala | Date Of Birth: 1975-12-12 | Aliases: N/A | Contact Info: View

City: 1-6 - Your Identifying Information | Foreign birth city contains the same value for city and country | Requires Review | Yes No

Citizenship Status: 9 - Citizenship | Subject has indicated they are a US citizen by birth but their birth place is outside the US | Requires Review | Yes No

I have read and reviewed the entire form attached. Any additional errors have been added in the comments area. \*

Additional Comments

Note: Additional comments must be filled out if the SF is being returned to the subject for updates

Cancel | Save | **Request Update From Subject** | Proceed to Authorization

4. Enter additional comments in the provided text field and select **Submit**. This will lead to the Request Submission page.

The screenshot shows the NBIS interface for subject 'Gains, Capital'. A modal dialog titled 'Enter SF Revision Comment' is open, prompting the user to provide additional comments. The dialog includes a text area and 'Cancel' and 'Submit' buttons. The background shows the subject's profile with fields for Citizenship (Guatemala), Place Of Birth (Guatemala), and Date Of Birth (06/25/1985). There are also checkboxes for 'I have read and reviewed the entire form' and 'Additional Comments'.

5. Select the “**Would you like to send an email to the subject?**” checkbox to send the request to the subject’s email. If selected, the template of the email appears in the Email Preview box and can be edited.
6. Select **Continue** to send the request.

The screenshot shows the 'Submission Details' section of the NBIS interface. The 'Would you like to send an email to the subject?' checkbox is checked and highlighted with a yellow box. Below this is the 'Email Preview' section, which displays a template email for 'Capital Gains'. The email content includes a header, a body with a warning about the 7-day deadline for corrections, and a summary of revisions and warnings. The 'Continue' button is highlighted with a yellow box.

