



SUBJECT WORKSHEET REVIEW

TABLE OF CONTENTS

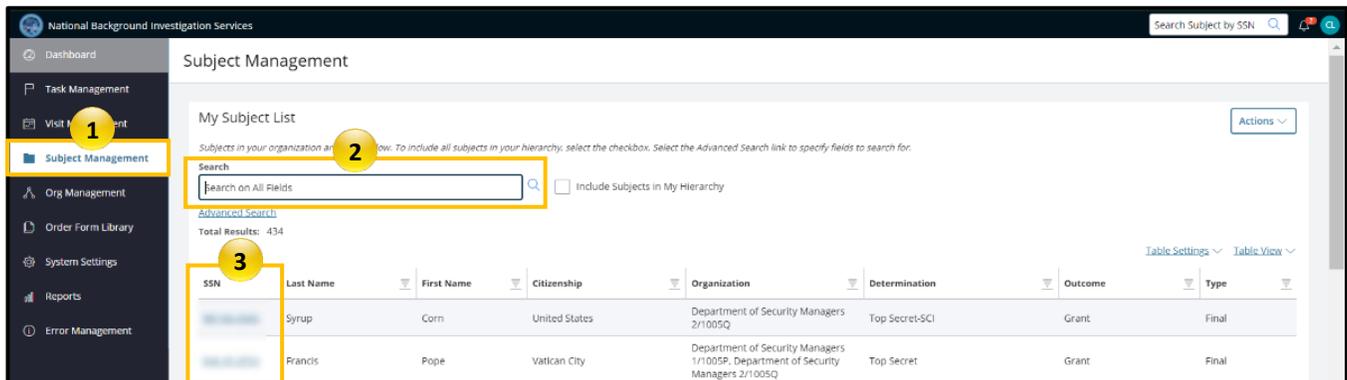
SUBJECT WORKSHEET REVIEW	1
HOW TO NAVIGATE TO THE SUBJECT'S WORKSHEET	1
SUBJECT BANNER.....	3
SUBJECT WORKSHEET TABS	4

Purpose: Introduce the user to the Subject Worksheet.

SUBJECT WORKSHEET REVIEW

How to Navigate to the Subject's Worksheet

1. Select **Subject Management** from the Left Navigation Menu.
2. Search for the subject by:
 - a. Entering the subject's first name, last name, or SSN, in the **Search on All Fields** textbox and select the **magnifying glass**  to execute the search, or
 - b. Scroll through the list of subjects in the table below the search field.
3. Select the **SSN** hyperlink corresponding with the subject to view the Subject Worksheet.



SSN	Last Name	First Name	Citizenship	Organization	Determination	Outcome	Type
[Redacted]	Syrup	Corn	United States	Department of Security Managers 2/1005Q	Top Secret-SC	Grant	Final
[Redacted]	Francis	Pope	Vatican City	Department of Security Managers 1/1005P, Department of Security Managers 2/1005Q	Top Secret	Grant	Final

4. The user will be directed to the subject's worksheet. The components of the subject's worksheet include:
 - a. The Subject Banner
 - b. Subject Worksheet tabs
 - c. Action cards (Add Notes, Upload Attachments)

Note: When viewing the subject's worksheet, the user works within the context of the subject's profile. To take action on a specific case, users must open a case and work from the case's worksheet.

Grey, Meredith 913-96-1294

Citizenship: United States Place of Birth: Seattle, Washington Date of Birth: 06/30/1992 Aliases: N/A Contact Info: [View](#)

Program Tags: **A** Actions ▾

Profile Attachments Notes

B **C**

Profile

Active Case History Vetting History

Active

Filter By
See All...

Cases [Expand All](#)

Case ID	Phase	Case Type	Start Date
21209GREY1541144	Adjudication	Tier 5 Reinvestigation	07/22/2021 See more
21362GREY1450225	Adjudication	Incident Report	12/26/2021 See more

Determinations

Type	Determination	Determined
Final	Top Secret - SCI	06/07/2021 See more

Affiliations [+ Add Affiliation](#)

Owning/Service Organization	Category	Main Organization
Department of Security Managers 1	Military	Department of Security Managers 1

Add Notes

Organization *
Select Organization...

Title
Enter Title...

Notes
Enter Notes... [Add](#)

Upload Attachments

Drag attachment here

[+ Select Attachments](#)
PDF, TIF, TIFF, JPG, JPEG, DOC, DOCX and PNG file types only

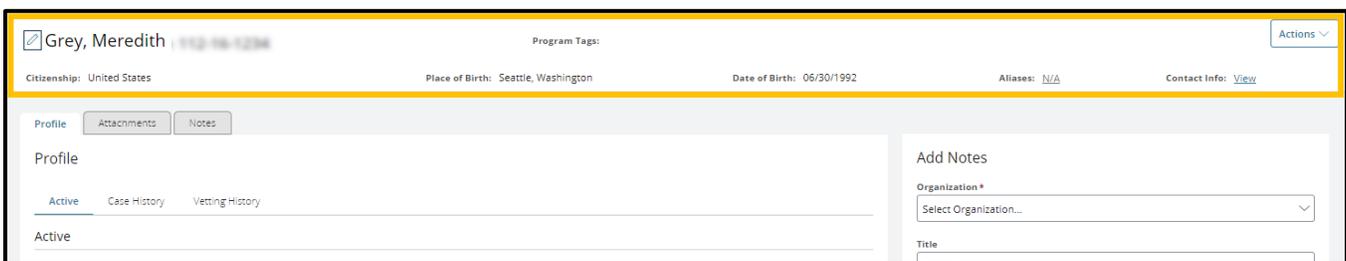
No attachments added. [Upload](#)

Subject Banner

1. The Subject Banner provides high-level information about the subject including SSN, program tags, citizenship, DoB, PoB, aliases, and contact information. The Subject Banner also includes the Actions drop-down.

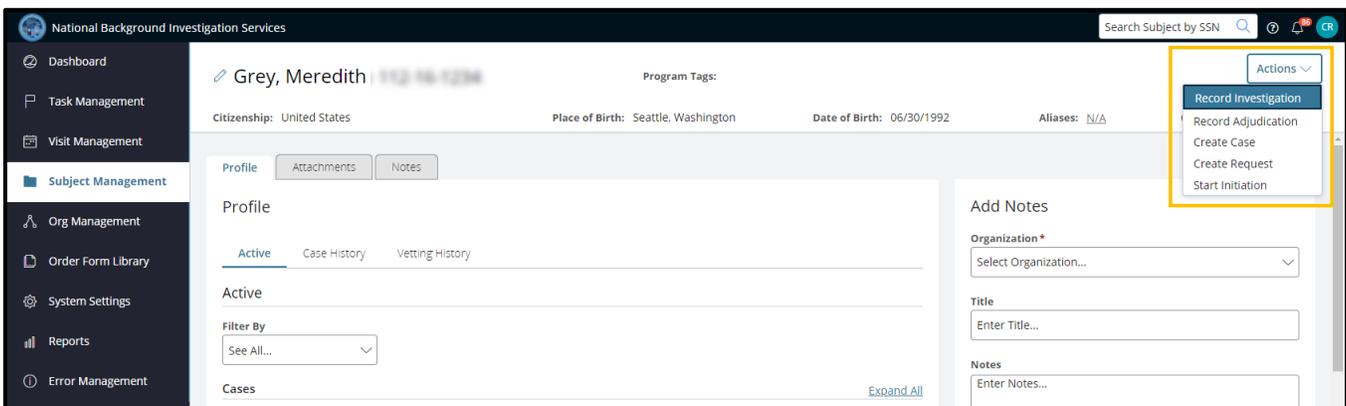
Note: When working in the context of a case, the Case Banner will display beneath the Subject Banner.

2. Select the **pencil** icon  to the left of the subject's name to make changes to high-level information. In addition to SSN, program tags, citizenship, DoB, PoB, aliases, and contract information, the subject's marital status can also be changed.



The screenshot shows the Subject Banner for Meredith Grey (SSN: 912-98-1234). The banner includes fields for Citizenship (United States), Place of Birth (Seattle, Washington), Date of Birth (06/30/1992), Aliases (N/A), and Contact Info (View). Below the banner are tabs for Profile, Attachments, and Notes. The Profile section has sub-tabs for Active, Case History, and Vetting History. The Active sub-tab is selected, showing a form with a Title field. To the right is an Add Notes section with an Organization dropdown and a Title field.

3. Select the **Actions** drop-down to take actions on the subject. The actions displayed will vary based on the user's role. Typical actions are to create a case, create a request, start initiation, record an investigation, record an adjudication, and reset the eApp password (only available when subject is in the Initiation phase).



The screenshot shows the Subject Banner for Meredith Grey with the Actions drop-down menu open. The menu options are: Record Investigation, Record Adjudication, Create Case, Create Request, and Start Initiation. The Record Investigation option is highlighted. The background shows the same Subject Banner as in the previous screenshot, but with a sidebar on the left containing navigation options like Dashboard, Task Management, Visit Management, Subject Management, Org Management, Order Form Library, System Settings, Reports, and Error Management.

Subject Worksheet Tabs

Within the Subject Worksheet, there are multiple tabs visible to the user including Profile, Attachments, and Notes.

Select the **Profile** tab to view Subject Profile information. The Profile tab contains three subtabs: Active, Case History, and Vetting History. The Active subtab displays current profile information while the Case History and Vetting History subtabs contain past determinations and past Access/Visit/Polygraph/CV Enrollment information respectively.

The screenshot shows the 'Profile' tab selected for Meredith Grey. The page displays personal information, tabs for Profile, Attachments, and Notes, and subtabs for Active, Case History, and Vetting History. The 'Active' subtab is active, showing a table of cases and a determinations table.

Case ID	Phase	Case Type	Start Date
21203GREY1541144	Adjudication	Tier 5 Reinvestigation	07/22/2021
21382GREY1450225	Adjudication	Incident Report	12/28/2021

Type	Determination	Determined
Final	Top Secret - SCI	06/07/2021

Affiliations table:

Owning/Service Organization	Category	Main Organization
Department of Security Managers 1	Military	Department of Security Managers 1

Profile

- View active cases, current determinations, affiliations, access, CV enrollments, visits, and polygraphs
- Depending on roles, users can:
 - Grant interim determinations
 - Update subject affiliations
 - Add/modify access
 - Submit visit requests
 - Add polygraph results
 - Use the Filter By drop-down for an isolated view of a selected section

Select the **Attachments** tab to view documents uploaded by the user's organization.

The screenshot shows the 'Attachments' tab selected for Meredith Grey. The page displays a table of attachments with columns for Name, Category, Case #, and Upload Date. A filter dropdown is set to 'Subject Profile'.

Name	Category	Case #	Upload Date
test123456	Other		12/15/2021
test	Other		12/14/2021
test	Other		07/26/2021

Attachments

- Users can view documents added by their organization or documents from other organizations listed as Communicative
- Use the Filter By drop-down to filter by case

Select the **Notes** tab to view notes added by the user's organization.

Grey, Meredith | 112-16-1234

Program Tags: [Actions]

Citizenship: United States | Place of Birth: Seattle, Washington | Date of Birth: 06/30/1992 | Aliases: N/A | Contact Info: [View](#)

Profile | Attachments | **Notes**

Notes

Case #
All Notes [Apply] [Clear Filter] [Expand All]

- 21362GREY1450225 - Subtask Note**
DODCAF | Department of Defense Consolidated Adjudications Facility
Notes
SOR attached
COMMUNICATIVE | 02/01/22 10:31 AM
- 21362GREY1450225 - Subtask Note**
DODCAF | Department of Defense Consolidated Adjudications Facility
Notes
SOR attached
COMMUNICATIVE | 02/01/22 10:26 AM

[Add]

Upload Attachments

Notes

- Users can view notes added by their organization or notes from other organizations listed as Communicative
- Use the Case # drop-down to filter by case

