# CREATE A SUBJECT AND SUBJECT PROFILE

#### TABLE OF CONTENTS

CREATE A SUBJECT	.1
HOW TO CREATE A NEW SUBJECT	.1
HOW TO UPDATE A SUBJECT'S PROFILE	4
	•••

## Purpose: To illustrate how to create a new subject and update the subject's profile.

#### **CREATE A SUBJECT**

#### How to Create a New Subject

1. Enter the subject's Social Security number (SSN) in the Global Subject Search box at the top right of the screen and select the **magnifying glass**. If the SSN is not currently associated with a subject in NBIS, the user will be prompted to create a new subject.

	National Background Inve	estigation Services							C	0 🗘		
Ø	Dashboard	Subject Mana	agement					-				
Р	Task Management											
ē	Visit Management	My Subject L	My Subject List Subjects in your organization are listed below. To include all subjects in your biararchy select the checkbox. Select the Advanced Search link to specify fields to sea									
	Subject Management	Search	anization are nat									
ጼ	Org Management	Search on All Fiel	Search on All Fields Q Include Subjects in My Hierarchy									
D	Order Form Library	Advanced Search Total Results: ⑦	Advanced Search Total Results: ① 1,034									
	System Settings								Table Settings V Table	<u>View</u> ~		
080	Reports	SSN	Last Name	\Xi First Nam	e \Xi Citi:	zenship 👳	Organization	Determination	ination Status	<u> </u>		
	Error Management		Bella	Stella	Unit	ted States	Defense Counterintelligence and Security Agency/1000C	Suitable/Fit	Active			
			Olive	Sarah	Unit	ted States	Defense Counterintelligence and Security Agency/1000C					
			Cook	Tia	Unit	ted States	Department of Security Managers 1/1005P	Secret	Active			
			Jetson	Judy	Uni	ted States	Office of Security Programs/1007F	Secret, Suitable/Fit	Active			
			BERGMAN	KAREN	Uni	ted States	Vetting Risk Operations CV/100P6					
		A 100 YO 100 YO 100	BRADY	EILEEN	Uni	ted States	Vetting Risk Operations CV/100P6					



## Job Aid

- 2. The No Social Security Number Found modal will display.
- 3. Select **Continue** to create a new subject.

G	National Background Inve	estigation Services						234578967	Q 0 🖉				
Q		Subject Man	agement										
Р	Task Management												
2		My Subject L	.ist					ſ	Actions				
-	Subject Management	Subjects in your or Search	ganization are lisi	ed below. To include a	ll subjects in your hierarchy, s	elect the checkbox. Select the Advanced Search	h link to specify fields to search	for. L					
አ		Search on All Fie	earch on All Fields										
D		Advanced Search Total Results: ⑦	Advanced Search No Social Security Number Found X Total Results: 0 1.034 No Subject found with the SSN: 234578967. Select the Close icon to try again or										
<u></u>				select Continue	to create a new subject with	this SSN.		Table Settings >> 1	Table View 🗸				
al	Reports	SSN	Last Name			Continue	Determination	🗵 Determination Sta	itus 📃				
6	) Error Management	967-65-4347	Bella			Security Agency/1000C	Suitable/Fit	Active					
)		187-65-4347	Olive	Sarah	United States	Defense Counterintelligence and Security Agency/1000C							
		987454047	Cook	Tia	United States	Department of Security Managers 1/1005P	Secret	Active					
		987-65-4347	Jetson	Judy	United States	Office of Security Programs/1007F	Secret, Suitable/Fit	Active					
		987-65-4347	BERGMAN	KAREN	United States	Vetting Risk Operations CV/100P6							
		987-65-4347	BRADY	EILEEN	United States	Vetting Risk Operations CV/100P6							
			DUSATEDI	IOSEPH	Lipited States	Votting Pick Operations OV/100P6							

4. Complete the required fields marked with an asterisk, then select **Continue**.

Rational Background Inve	estigation Services			Search Subject	by SSN 🔍 🛛 🖓 📿
② Dashboard	Create New Subject				
Task Management	Identifying Information				
🗐 Visit Management	Social Security Number (SSN)	Electronic Data Interchange Personal ID (EDIPI)			
	0/4-03-2002	Enter EDIPI			
Subject Management	First Name*	Middle Name or Initial	Last Name*	Suffix	
🖧 Org Management	Enter First Name	Enter Middle Name	Enter Last Name	Select Suffix V	
Order Form Library	Email Address*	Phone Number*			
	Enter Email Address	XXX-XXX-XXXX			
Operation of the settings of the settings of the settings of the settings of the setting of t	Marital Status*				
el] Reports	Select Marital Status 🗸				
Error Management					
	No citizenship added,				
	+ Add Subject Citizenship				
	Birth Information	Country			
	mm/dd/yyyy	Select Country ~			
	Enter City	Enter County	Select State		
				J	
	Cancel				Continue
					· · ·

- 5. Add an affiliation by selecting the **organization** from the drop-down menu under Owning Organization.
- 6. Select the appropriate option from the Category drop-down menu.
- 7. Select Submit.

	National Background Inve	ustigation Services	Search Subject by SSN	Q 🛛 🖓 😒
Ø	Dashboard	Create New Subject		
Р	Task Management			
	Visit Management	Add Affiliation To add an affiliation, complete the fields below and select the Submit button.		
	Subject Management	Owning Organization * Category * Main Organization		
ጼ	Org Management	Select Owning Org V Select Category V		
۵	Order Form Library	+ Add Servicing Organization		
٩	System Settings			
cl)	Reports	Cancel Back		Submit
0	Error Management			

8. A green success banner confirms the subject profile was created.

6	National Background Inve	stigation Services		Search Subject by SSN 🔍 🕘 🗘
Ø	Dashboard	Smith, George	Program Tags:	$igar{}$ Actions $arphi$
Р	Task Management	Citizanshin: United States	Place of Birth: Washington, District of Date of Birth	Aliasas: N/A Contact Info: View
	Visit Management	crazensing. Onited states	Columbia	
	Subject Management		Success. New subject Smith, George was created.	
አ	Org Management	Profile Attachments Notes		
۵	Order Form Library	Profile		Add Notes
ø	System Settings	Active Case History Vetting History		Organization*
ıtl	Reports	Active		Select Organization
0	Error Management	Filter By		Enter Title
		See All 🗸		Notes
		Cases	Expand All	Enter Notes
		There are currently no open cases.		
		Determinations	+ Grant Determination	Add

### How to Update a Subject's Profile

1. Enter the subject's SSN in the Global Subject Search box at the top right of the screen, then select the **magnifying glass**.

6	National Background Inve	stigation Services								Q	o 🗘 🛛			
Ø	Dashboard	Subject Mana	ubject Management											
Р	Task Management													
ē	Visit Management	My Subject L	My Subject List Subjects in your organization are listed below. To include all subjects in your hierarchy, select the checkbox. Select the Advanced Search link to specify fields to search for. Search											
	Subject Management	Subjects in your org												
ぷ	Org Management	Search on All Fiel	Search on All Fields Q Include Subjects in My Hierarchy											
٥	Order Form Library	Advanced Search Total Results: ⑦	1,035						Table Carlos	Table M				
Ô	System Settings								Table Setting:		ew ~			
11	Reports	SSN	Last Name	First Name	Citizenship	Ŧ	Organization	<b>Determination</b>	= Determinat	ion Status	=			
0	Error Management	165.85.2455	Bella	Stella	United States		Defense Counterintelligence and Security Agency/1000C	Suitable/Fit	Active					
		107-02-024	Olive	Sarah	United States		Defense Counterintelligence and Security Agency/1000C							
		365.85.2655	Cook	Tia	United States		Department of Security Managers 1/1005P	Secret	Active					

### 2. The subject worksheet will display.

	National Background Inve	stigation Services			Search Subject by	SSN 🔍 🖲 🗘
Ø	Dashboard	Smith, George	Program Tags:			Actions $\checkmark$
Р	Task Management		Place of Birth: Washington, District of			
Ē	Visit Management	Citizenship: United States	Columbia	te of Birth:	Aliases: <u>N/A</u> Co	ntact Info: <u>View</u>
	Subject Management	Profile Attachments Notes				
ጼ	Org Management	Profile		A	dd Notes	
D	Order Form Library	Active Case History Vetting History		or	rganization * select Organization	~
Ô	System Settings	Active		Tit	tle	
101	Reports	Filter By		E	inter Title	
(1)	Error Management	See All 🗸		No	otes	
_		Cases		Expand All E	nter Notes	
		There are currently no open cases.				
		Determinations	+ <u>Grant</u>	Determination		Add
		There are no current determinations.				
		Affiliations	н	+ Add Affiliation U	pload Attachments	

3. Select the **pencil icon** next to the subject's name to begin editing.

	National Background Inve	estigation Services			Search Subject by	SSN 🔍 🕅 🖉
Ø	Dashboard	Smith, George	Program Tags:			Actions $\checkmark$
Р	Task Management		Place of Birth: Washington, District of			
	Visit Management	Citizenship: United States	Columbia	Date or birth: 07/09/1975	Aliases: <u>N/A</u> C	ontact Info: <u>View</u>
	Subject Management	Profile Attachments Notes				
ጼ	Org Management	Profile			Add Notes	
۵	Order Form Library	Active Case History Vetting History			Organization*	~
¢	System Settings	Active			Title	
ol)	Reports	Filter By			Enter Title	
Ē	Error Management	See All 🗸			Notes	
	o	Cases		Expand All	Enter Notes	
		There are currently no open cases.				
		Determinations		+ Grant Determination		Add
		There are no current determinations.				
		Affiliations		+ Add Affiliation	Upload Attachments	

4. The Edit Subject Information page will display. Make necessary changes in the fields.

	National Background Inve	stigation Services						Search Subj	ect by SSN	0 4
Ø	Dashboard	Smith, George	0	Program	n Tags:					
P	Task Management	etti an him tu in terren	Pla	ce of Birth: Washing	ton, District of				<b>6</b>	
Ē	Visit Management	Citizensnip: United States		Columbia	a	Date of Birth:		Allases: <u>N/A</u>	Contact Inf	o: <u>View</u>
	Subject Management	Edit Subject Information								
ሌ	Org Management	Personal Information								
	Order Form Library	Identifying Information								
ø	System Settings	Social Security Number (SSN)		Electronic Data Inte	erchange Persona	I ID (EDIPI)	Passport Numb	per		
al	Reports			Enter EDIPI	J		Enter Passpor	rt N		
		First Name*	Middle Name o	vr Initial	Last	: Name*		Suffix		
()	Error Management	George	Enter Middle	Name	Sm	iith		Select Suffix $\checkmark$		
	, i	Home Address								
		Country	Street Address		City			Zip Code		
		~	Enter Street a	ddress	En	ter City				
		Email Address*	Phone Number	r*						
		george.smith@test.mail	123-456-7890	J						
		Marital Status*								_

5. Select **Submit** once changes have been made.

	National Background Inv	estigation Services					Search Subject by SSN	Q @ 4 S
Ø	Dashboard	Smith. George		Program Tags:				
Р	Task Management		Place of Birth:	Washington, District of				
Ē	Visit Management	Citizenship: United States		Columbia	Date of Birth:	Alias	es: <u>N/A</u> Conta	ct Info: <u>View</u>
	Subject Management	Birth Information	Country*					
ሌ	Org Management		United States	~				
D	Order Form Library	City*	County	Stat	te/Province*			
¢	System Settings	Washington	Enter County	Dis	strict of Columbia	~		
oll	Reports	Program Tags						
	Error Management	Show Disabled Program Tags						
		Program Tags						
		Select Program rags		<u> </u>				
		Cancel						Submit

