



VISIT MANAGEMENT: VISIT REQUEST FUNCTIONS

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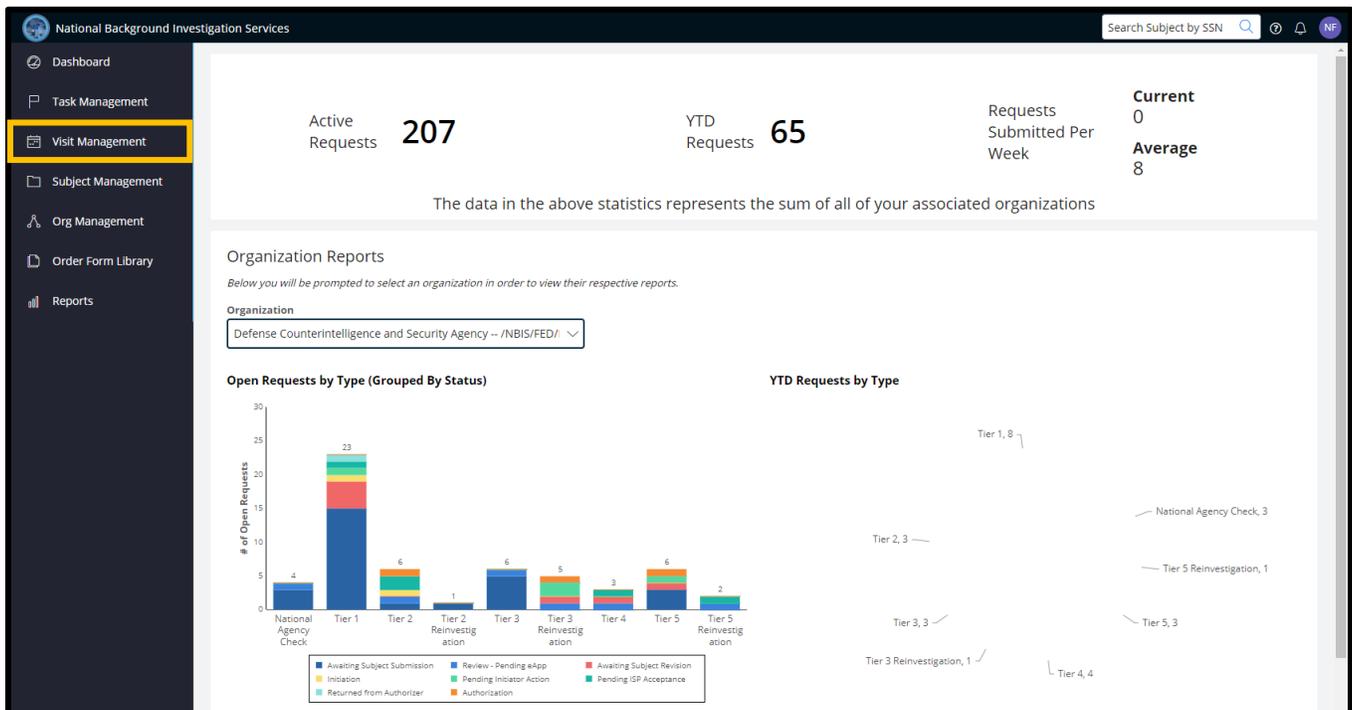
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Purpose: To illustrate various visit request functions within the Visit Management tab.

VISIT MANAGEMENT: VISIT REQUEST FUNCTIONS

How to Check the Status of Visitors in a Visit Request

1. Select **Visit Management** from the Left Navigation Menu.



2. Select the **Today** or **Upcoming** tab.

Note: To expand this screen for more information about the visit, select the **See more** link.

3. Select the **Visit Name** hyperlink.

National Background Investigation Services

Search Subject by SSN

Dashboard
Task Management
Visit Management
Subject Management
Org Management
Order Form Library
Reports

Visit Management

Tasks Today **Upcoming** History

Visit Type: All

Hosting [Expand All](#)

Visit Name	Requesting Organization	Start Date	End Date	Attendees
Hosting_Visit_Test	Defense Counterintelligence and Security Agency	07/05/2022	07/08/2022	0 View

[See more](#)

Visiting [Expand All](#)

Visit Name	Hosting Organization	Start Date	End Date	Attendees
Visit_Request_Test	Department of Security Managers 1	07/05/2022	07/08/2022	0 View

[See more](#)

4. Scroll down to view the list of visitors for this event. Check the Status column in the Visitors section to see whether a visitor was approved or denied. Select **Cancel** to return to the Visit Management screen.

National Background Investigation Services

Search Subject by SSN

Dashboard
Task Management
Visit Management IN PROGRESS
Subject Management
Org Management
Order Form Library
System Settings
Reports
Error Management

Visit Management

Actions

Visit Description

Requested Organizations

Organizations
Department of Security ...

Visitors

To add a visitor from your organization, select the Add Visitor link below. To remove a visitor, select the trash can icon.

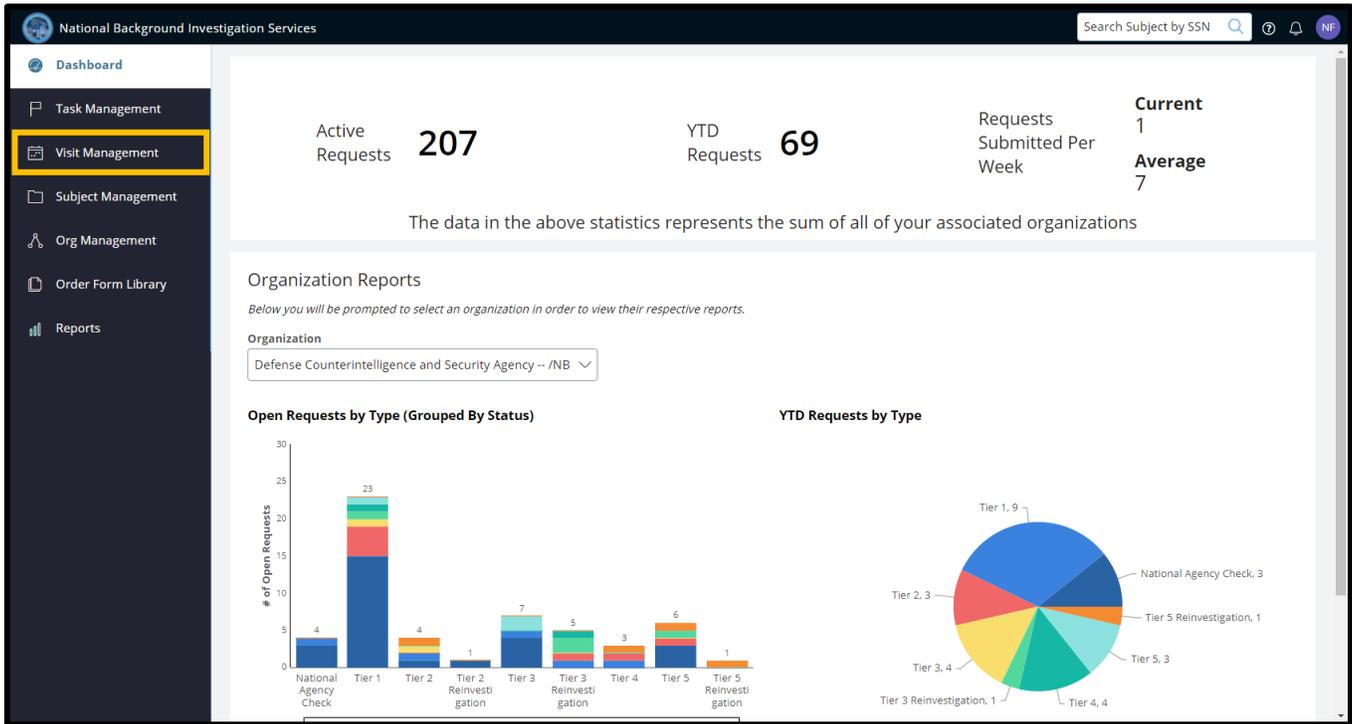
SSN	Name	Organization Name	Organization Code	Determination	Access Type	Status
[REDACTED]	[REDACTED]	Department of Security Managers 1	1005P	Not Specified	Not Specified	Approved
[REDACTED]	[REDACTED]	Department of Security Managers 1	1005P	Not Specified	Not Specified	Denied
[REDACTED]	[REDACTED]	Department of Security Managers 1	1005P	Not Specified	Not Specified	Pending
[REDACTED]	[REDACTED]	Department of Security Managers 1	1005P	Not Specified	Not Specified	Pending

[+ Add Visitor](#)

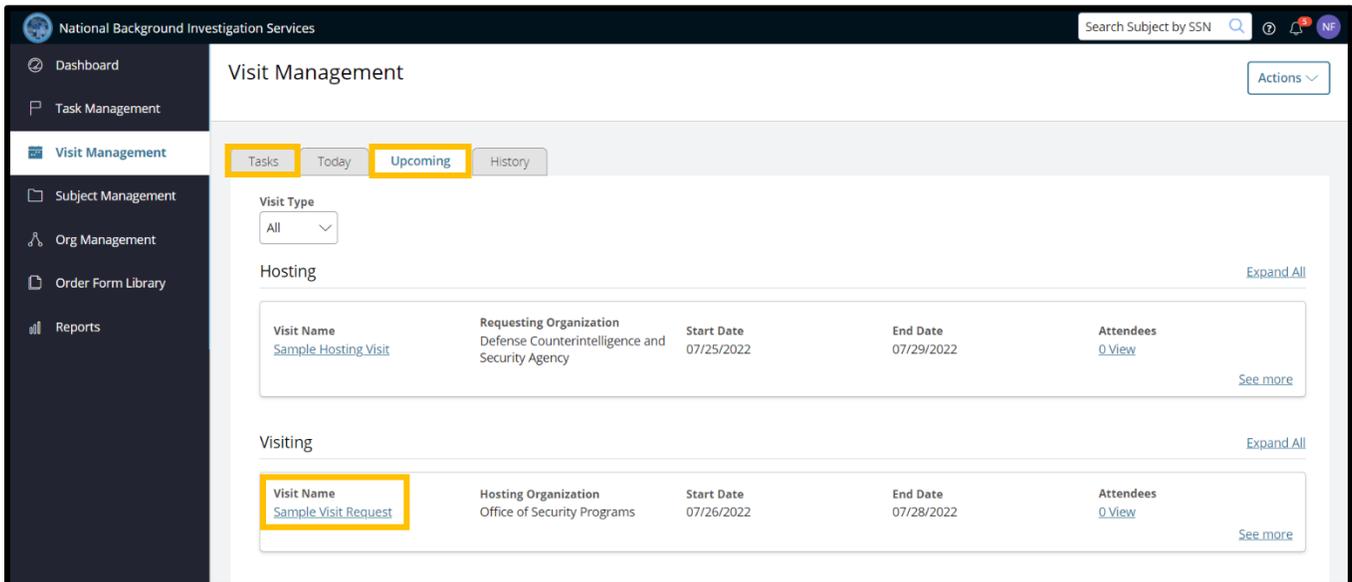
[Cancel](#) [Submit](#)

How to Add Visitors to an Existing Visit

1. Select **Visit Management** from the Left Navigation Menu.

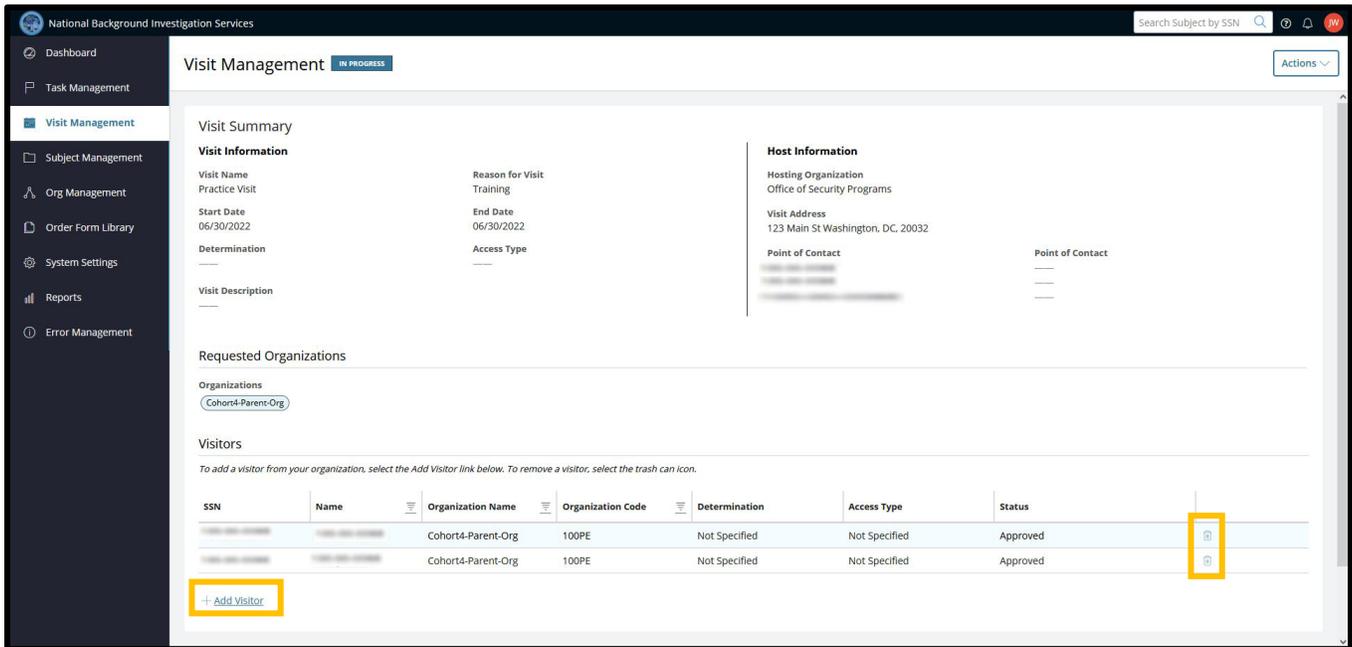


2. Select the **Visit Name** hyperlink from the Tasks tab or the Visiting section of the Upcoming tab.



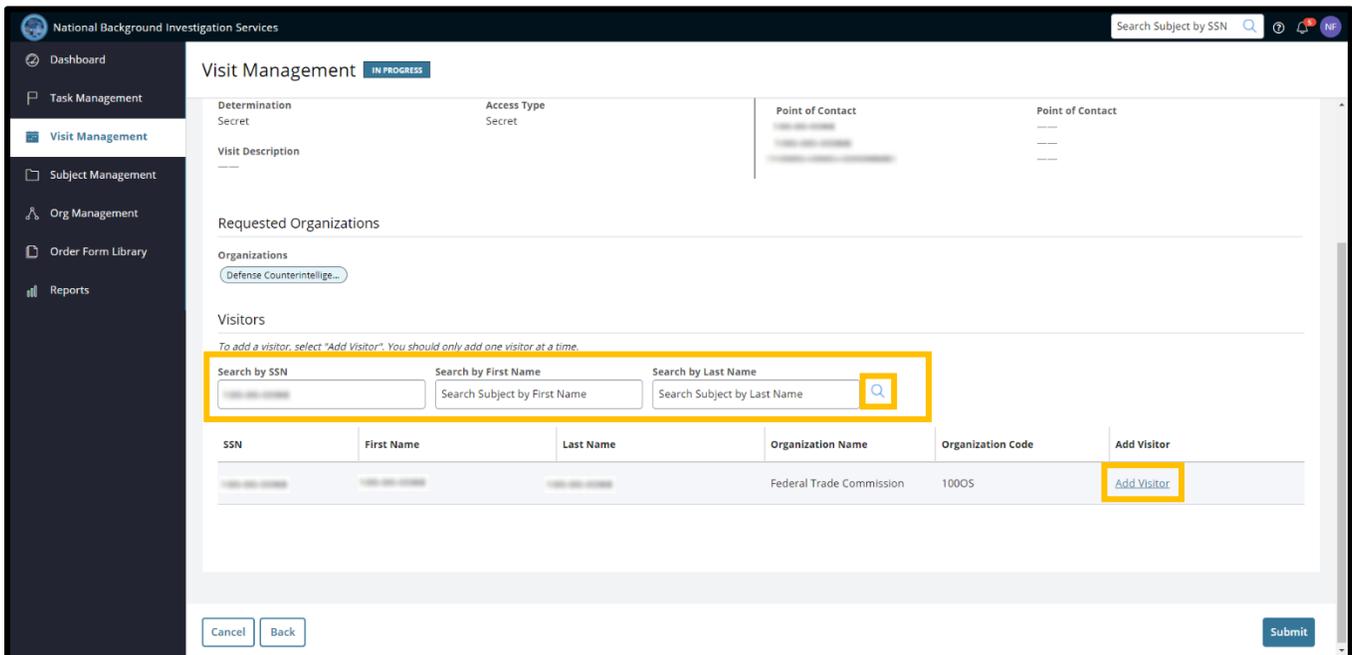
3. Select the **+Add Visitor** hyperlink to open the Search by fields.

Note: Select the **trash can** icon to remove a visitor.



4. Use the Search by SSN, Search by First Name, or Search by Last Name fields to find a user to add to the visit. Select the **magnifying glass** icon to initiate the search.

5. From the search results, select the **Add Visitor** hyperlink at the right of the subject's row.



6. Once the list of visitors is set, select **Submit**.

National Background Investigation Services

Search Subject by SSN

Visit Management **IN PROGRESS**

Determination: Secret, Access Type: Secret, Point of Contact: [Redacted]

Requested Organizations

Organizations: Defense Counterintelligence...

Visitors

To add a visitor from your organization, select the Add Visitor link below. To remove a visitor, select the trash can icon.

SSN	Name	Organization Name	Organization Code	Determination	Access Type	Status	
[Redacted]	[Redacted]	DCSA Adjudications	1000D	Not Specified	Not Specified	Pending	
[Redacted]	[Redacted]	Breakout Room Two	1000Q	Not Specified	Not Specified	Pending	
[Redacted]	[Redacted]	Federal Trade Commission	1000S	Not Specified	Not Specified	Pending	

+ Add Visitor

Cancel **Submit**

7. The green success banners confirm the visit was edited and the visitors were updated. Select **Close** to return to the Visit Management home screen.

National Background Investigation Services

Search Subject by SSN

Visit Management **IN PROGRESS**

Success. Visit edited.

Success. Visitors updated.

Visit Name: Sample Visit Request, Reason for Visit: Training, Hosting Organization: Office of Security Programs

Start Date: 07/26/2022, End Date: 07/28/2022, Visit Address: 123 Main St Washington, DC, 20032

Determination: Secret, Access Type: Secret, Point of Contact: [Redacted]

Requested Organizations

Organizations: Defense Counterintelligence...

Visitors

SSN	Name	Organization Name	Organization Code	Determination	Access Type	Status
[Redacted]	[Redacted]	DCSA Adjudications	1000D	Not Specified	Not Specified	Pending
[Redacted]	[Redacted]	Breakout Room Two	1000Q	Not Specified	Not Specified	Pending
[Redacted]	[Redacted]	Federal Trade Commission	1000S	Not Specified	Not Specified	Pending

Close

How to Cancel a Visit Request

1. Select **Visit Management** from the Left Navigation Menu.

The screenshot shows the National Background Investigation Services dashboard. The left navigation menu has 'Visit Management' highlighted. The main content area displays statistics: Active Requests (207), YTD Requests (65), Current Requests Submitted Per Week (0), and Average (8). Below the statistics is a section for 'Organization Reports' with a dropdown menu set to 'Defense Counterintelligence and Security Agency -- /NBIS/FED/'. Two charts are shown: 'Open Requests by Type (Grouped By Status)' and 'YTD Requests by Type'. The first chart is a stacked bar chart showing the number of open requests for various tiers and categories. The second chart is a line graph showing YTD requests for different tiers.

Category	Value
National Agency Check	4
Tier 1	23
Tier 2	6
Tier 2 Reinvestigation	1
Tier 3	6
Tier 3 Reinvestigation	5
Tier 4	3
Tier 5	6
Tier 5 Reinvestigation	2

Tier	Value
Tier 1, 8	1
Tier 2, 3	1
Tier 3, 3	1
Tier 3 Reinvestigation, 1	1
Tier 4, 4	1
National Agency Check, 3	1
Tier 5 Reinvestigation, 1	1
Tier 5, 3	1

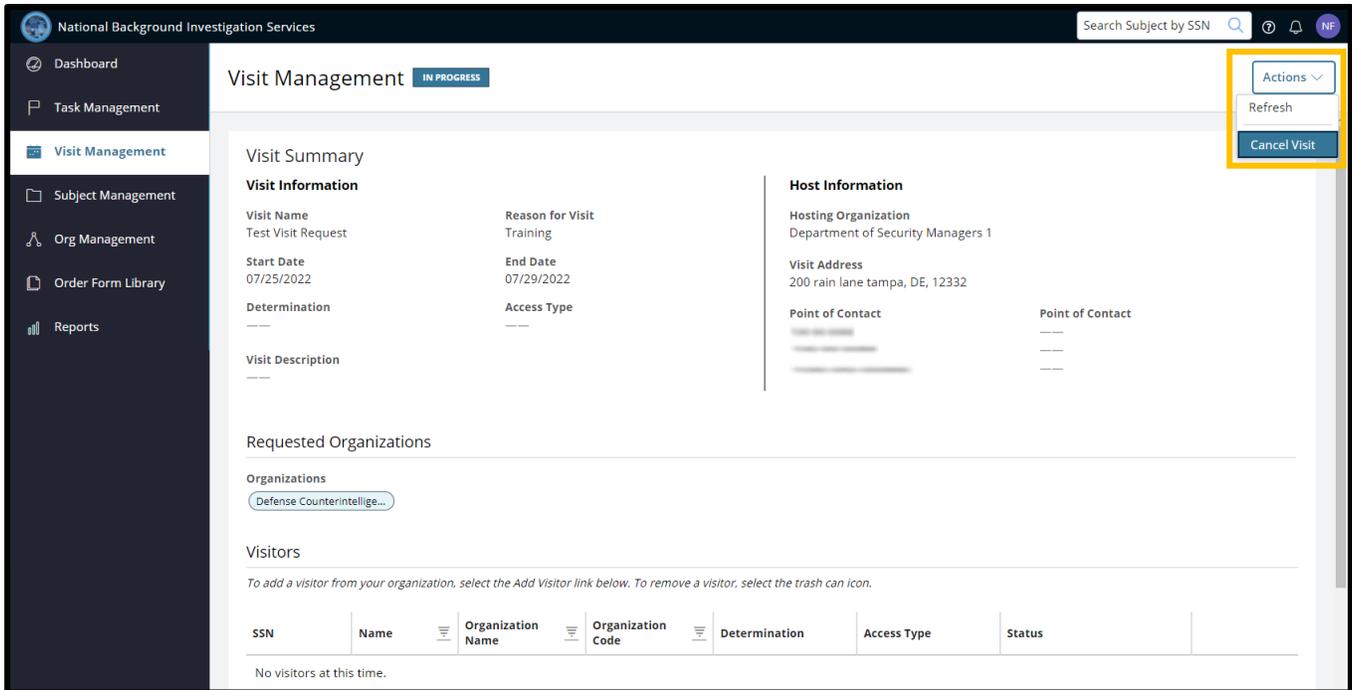
2. Select the **Upcoming** tab.

3. Select the **Visit Name** hyperlink from the Visiting section.

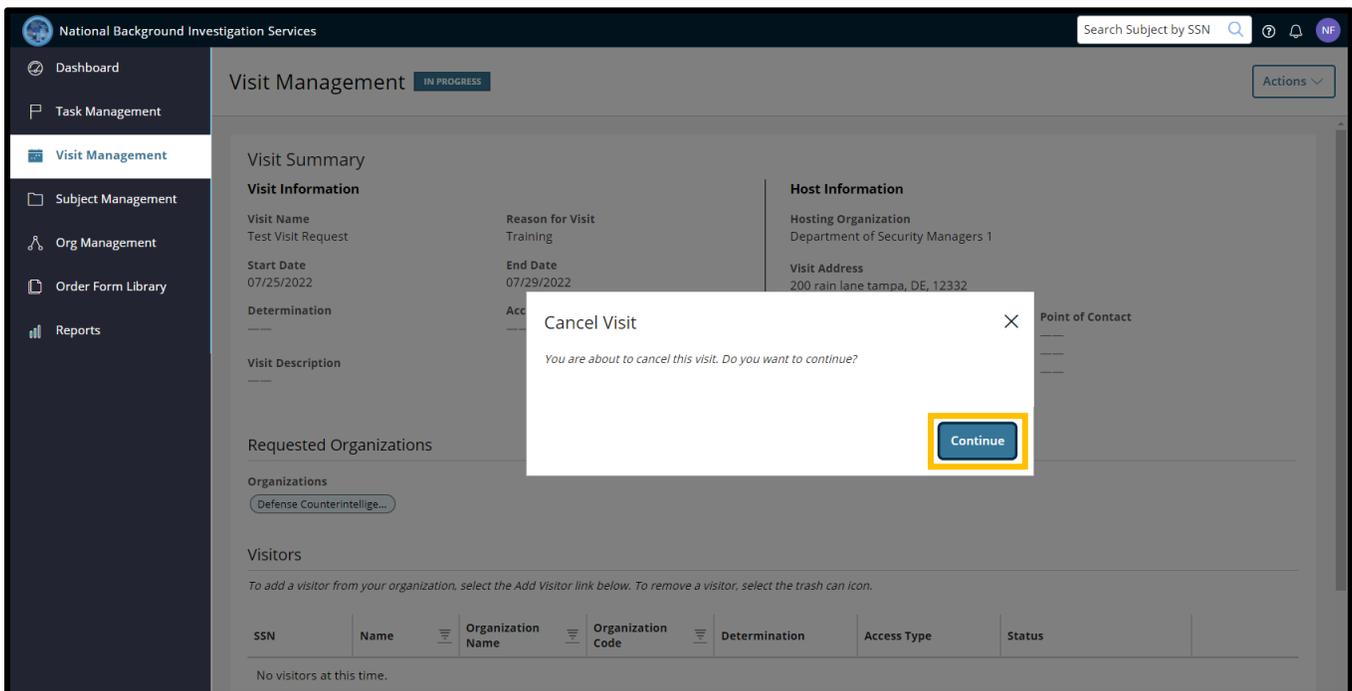
The screenshot shows the National Background Investigation Services Visit Management page. The 'Upcoming' tab is selected. The page displays a list of visits under the 'Visiting' section. The 'Test Visit Request' link is highlighted with a yellow box.

Visit Name	Requesting Organization	Start Date	End Date	Attendees
Test Host Visit	Defense Counterintelligence and Security Agency	07/18/2022	07/22/2022	0 View
Test Visit Request	Hosting Organization Department of Security Managers	07/25/2022	07/29/2022	0 View

4. Select **Cancel Visit** from the Actions drop-down.



5. The Cancel Visit pop-up appears to confirm that the visit is about to be cancelled. Select **Continue**.



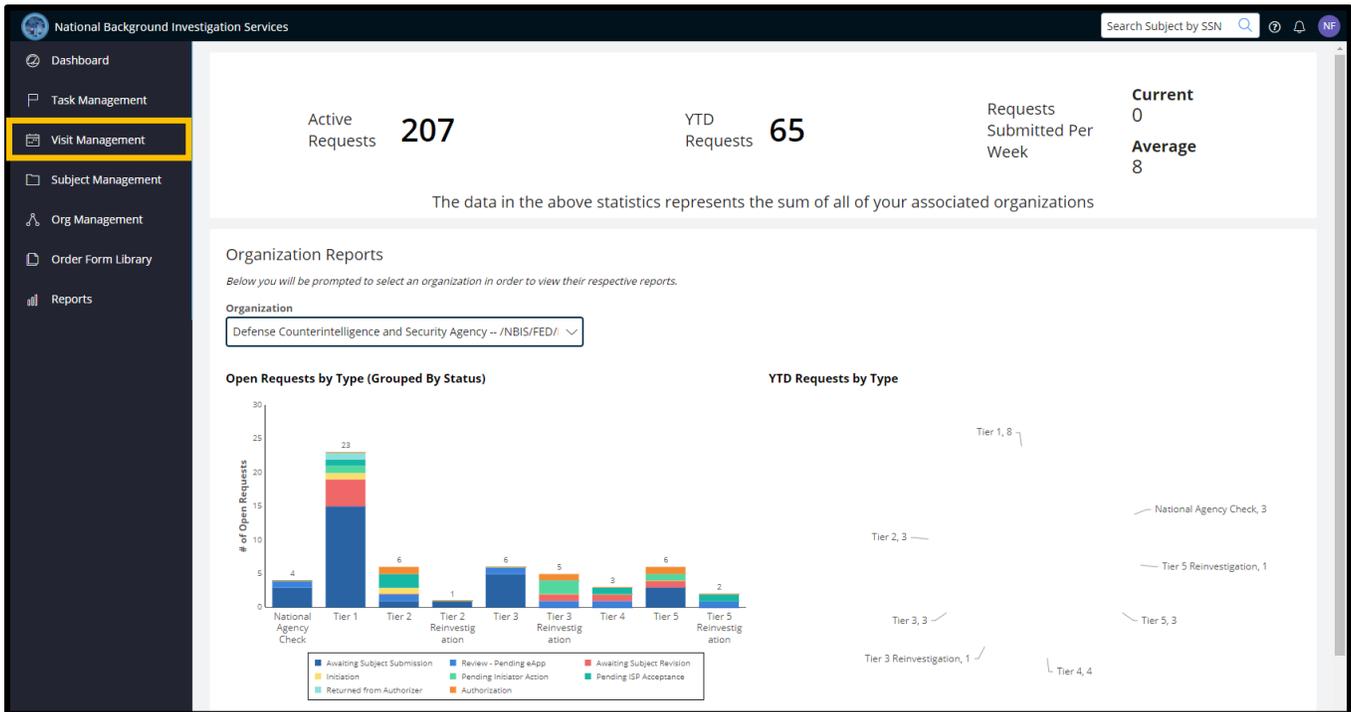
6. A green success banner confirms the visit has been canceled and a blue status box now displays CANCELLED. Select **Visit Management** from the Left Navigation Menu to return to the Task Inbox screen.

The screenshot displays the 'Visit Management' page in the National Background Investigation Services application. The page title is 'Visit Management' with a blue 'CANCELLED' status box next to it. A green success banner at the top reads 'Success. Visit cancelled.' The left navigation menu is visible, with 'Visit Management' highlighted. The main content area is divided into sections: 'Visit Summary', 'Visit Information', 'Host Information', 'Requested Organizations', and 'Visitors'. The 'Visit Information' section includes fields for Visit Name, Reason for Visit, Start Date, End Date, Determination, and Access Type. The 'Host Information' section includes fields for Hosting Organization, Visit Address, and Point of Contact. The 'Requested Organizations' section shows a search bar with 'Defense Counterintellige...' entered. The 'Visitors' section includes a table with columns for SSN, Name, Organization Name, Organization Code, Determination, Access Type, and Status.

SSN	Name	Organization Name	Organization Code	Determination	Access Type	Status
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How to Edit the Location of an Existing Hosted Event

1. Select **Visit Management** from the Left Navigation Menu.



2. Select the **Today** or **Upcoming** tab.

3. Select a **hosting visit** hyperlink from the Visit Name column.

The screenshot shows the "Visit Management" page with the "Today" and "Upcoming" tabs selected. The "Visit Type" is set to "All". The "Hosting" section contains a table with one row:

Visit Name	Requesting Organization	Start Date	End Date	Attendees
Hosting Visit Test	Defense Counterintelligence and Security Agency	07/05/2022	07/08/2022	0 View

The "Visiting" section contains a table with one row:

Visit Name	Hosting Organization	Start Date	End Date	Attendees
Visit Request Test	Department of Security Managers 1	07/05/2022	07/08/2022	0 View

4. Select **Edit Host Details** from the Actions drop-down menu.

The screenshot shows the 'Visit Management' page in the 'IN PROGRESS' state. The page is divided into several sections: 'Visit Summary', 'Visit Information', 'Host Information', 'Requested Organizations', and 'Visitors'. The 'Actions' menu is open in the top right corner, with 'Edit Host Details' highlighted. The 'Visit Information' section includes fields for Visit Name, Reason for Visit, Start Date, End Date, Determination, and Access Type. The 'Host Information' section includes fields for Hosting Organization, Visit Address, and Point of Contact. The 'Requested Organizations' section shows a list of organizations, with 'Department of Security...' selected. The 'Visitors' section includes a table with columns for SSN, Name, Organization Name, Organization Code, Determination, Access Type, and Status.

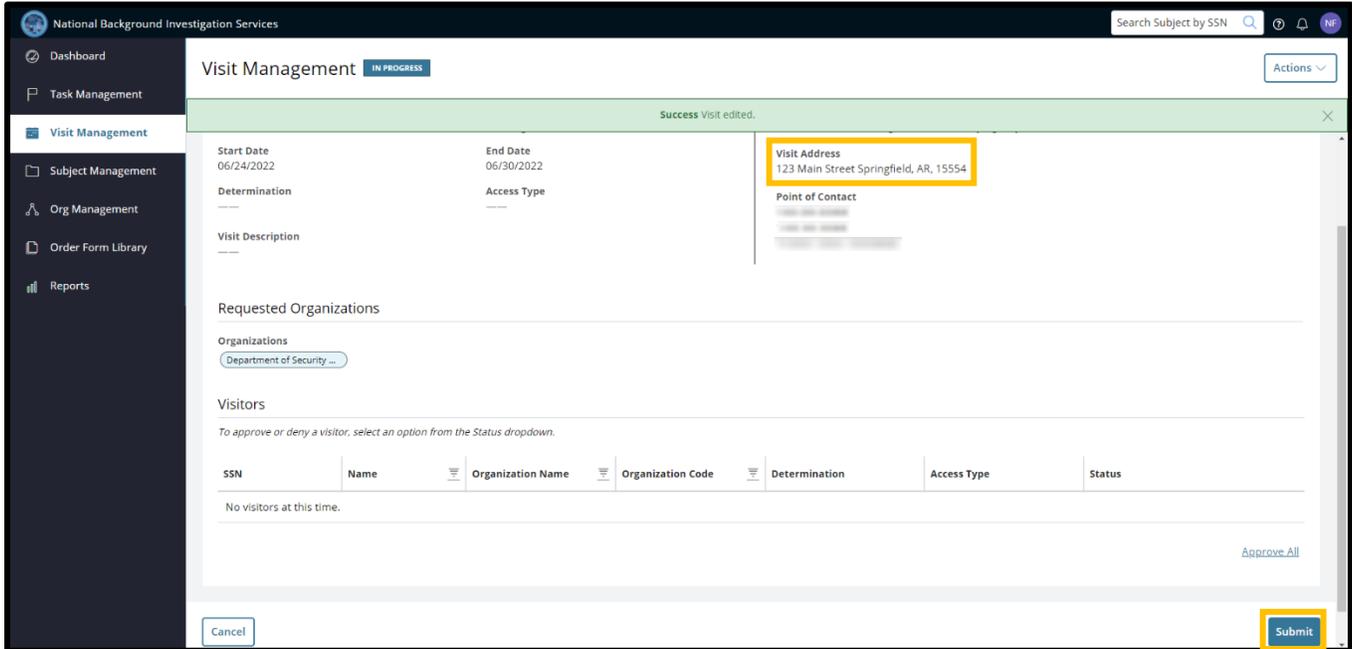
5. Update the location data fields to reflect the new address for the hosted event.

6. Select **Submit**.

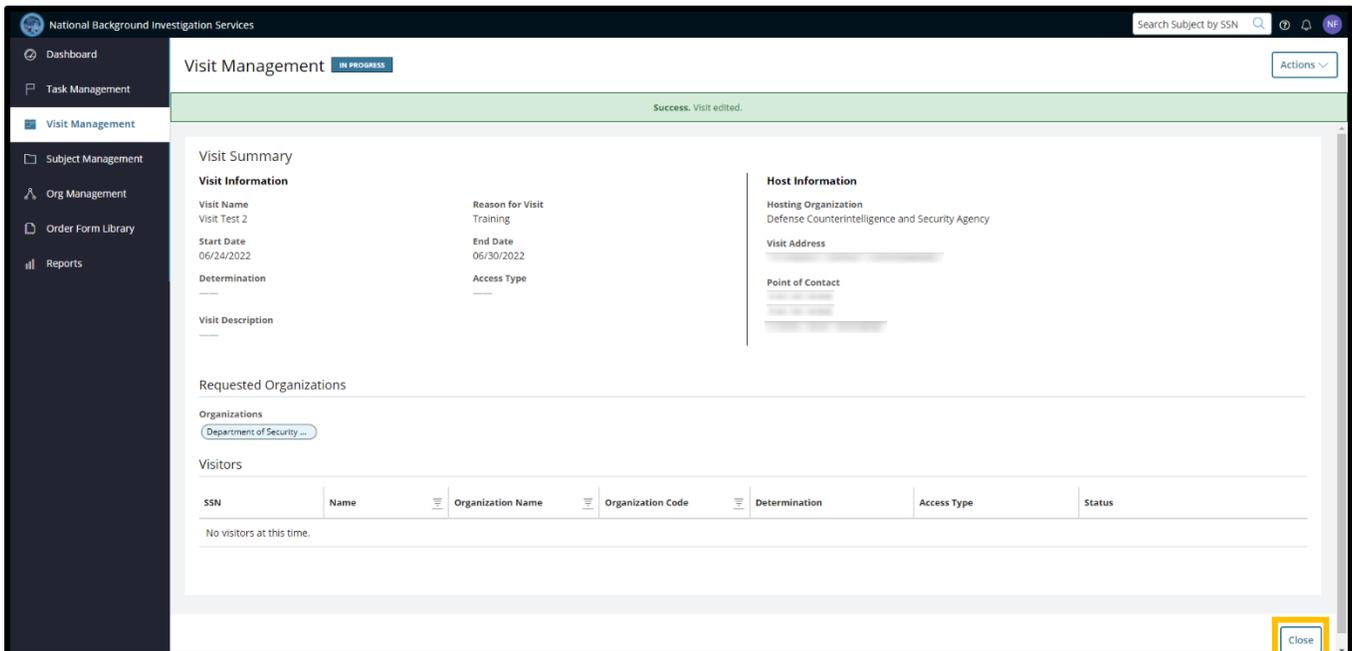
The screenshot shows the 'Visit Management' page in the 'IN PROGRESS' state, focusing on the location data fields. The 'City' field is set to 'Springfield' and the 'State' field is set to 'Arkansas'. The 'Zip Code' field is set to '15554'. The 'Point of Contact' section includes fields for Name 1*, Phone Number 1*, and Email Address 1*. The 'Submit' button is highlighted in the bottom right corner.

7. A green success banner confirms the visit has been edited. Select **Submit**.

Note: The new address now displays as the visit address for the hosted event.

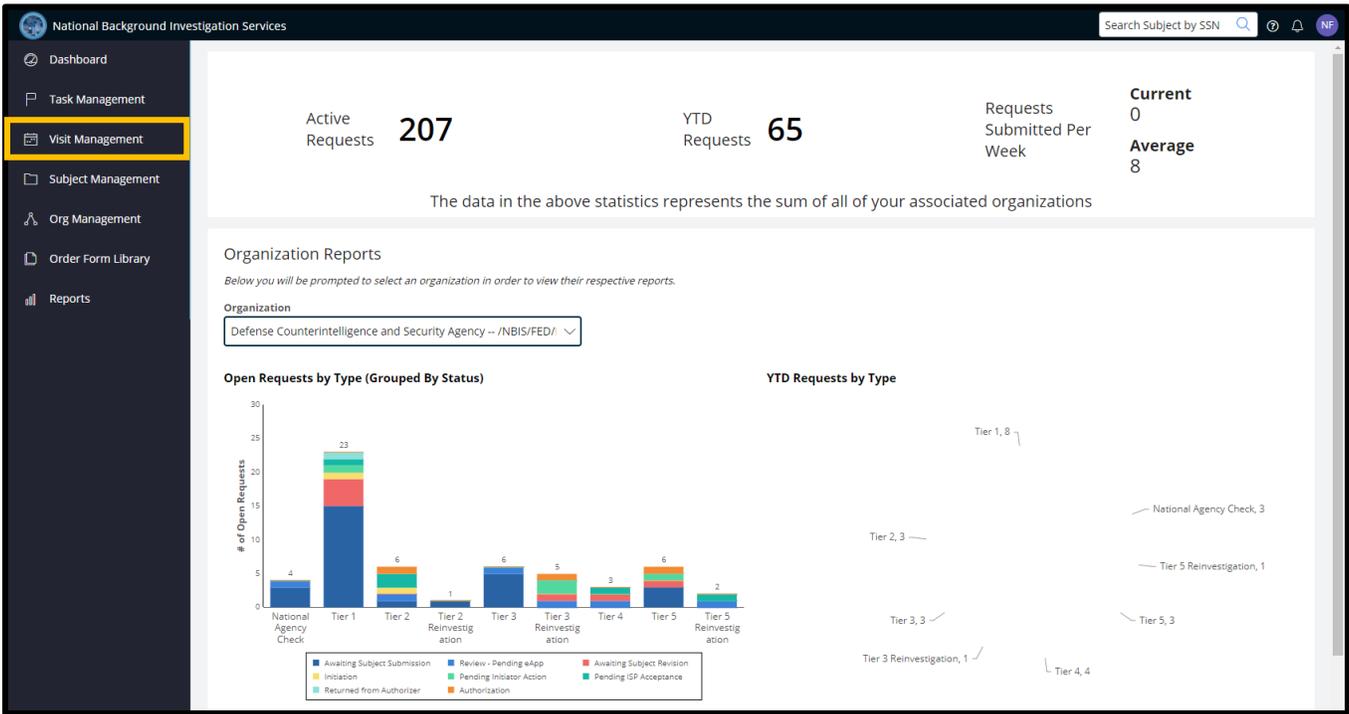


8. The Submit button is replaced with the Close button. Select **Close**.



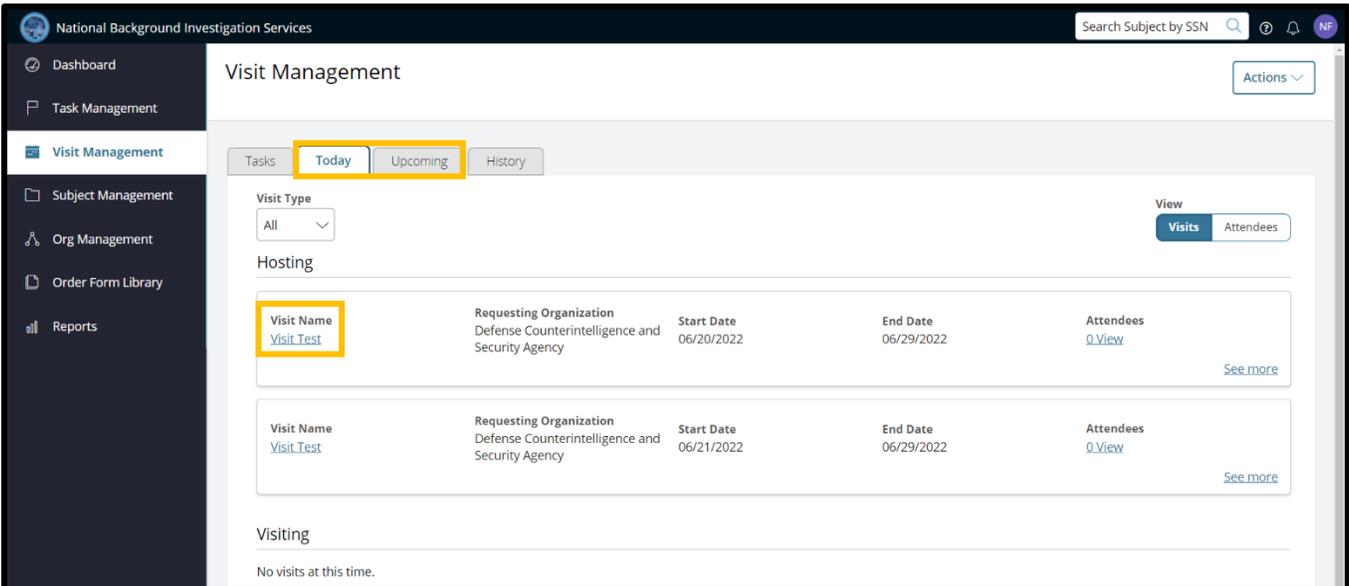
How to Set or Upgrade the Eligibility/Access Level of an Existing Visit

1. Select **Visit Management** from the Left Navigation Menu.



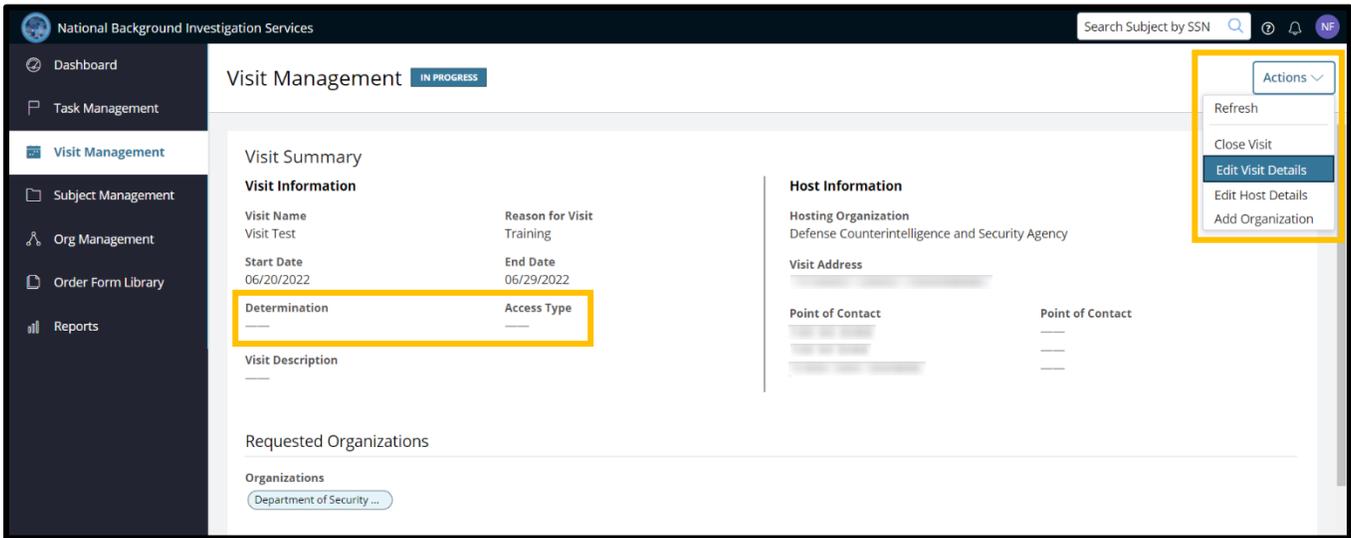
2. Select the **Today** or **Upcoming** tab.

3. Select the **Visit Name** hyperlink from the Hosting section.



To update the security determination and access type to Secret:

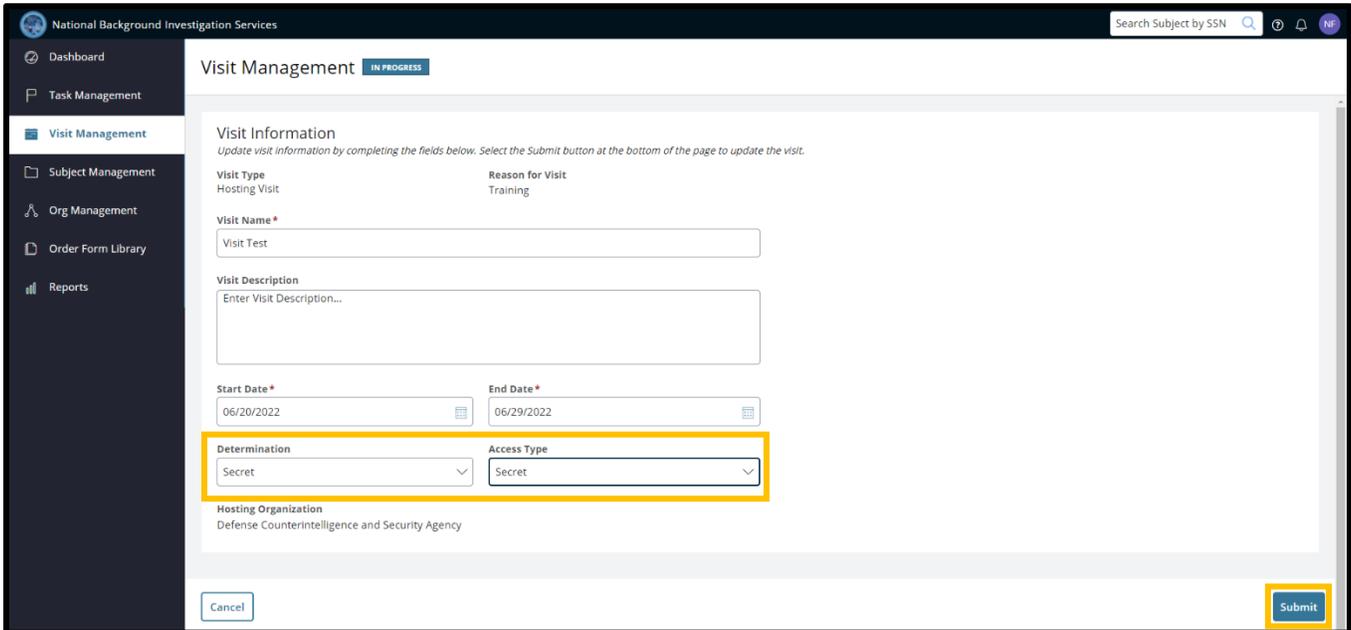
4. Select **Edit Visit Details** from the Actions drop-down.



5. Update the Determination and Access Type fields to **Secret**.

Note: All previously completed fields will remain filled out.

6. Select **Submit**.



Note: Any visitor that was previously approved will be returned to a Pending status. The Host will need to approve/deny them again after this update.

7. A green success banner confirms the Determination and Access Type have been successfully changed to Secret. Select **Submit**.

National Background Investigation Services

Search Subject by SSN

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

Reports

Visit Management **IN PROGRESS**

Success Visit edited.

Visit Summary

Visit Information

Visit Name Reason for Visit
Visit Test Training

Start Date End Date
06/20/2022 06/29/2022

Determination **Access Type**
Secret Secret

Visit Description

Host Information

Hosting Organization
Defense Counterintelligence and Security Agency

Visit Address

Point of Contact

Requested Organizations

Organizations
Department of Security ...

Visitors

To approve or deny a visitor, select an option from the Status dropdown.

SSN	Name	Organization Name	Organization Code	Determination	Access Type	Status
No visitors at this time.						

Approve All

Cancel **Submit**

8. Review the information, scroll down, and select **Close**.

National Background Investigation Services

Search Subject by SSN

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

Reports

Visit Management **IN PROGRESS**

Success. Visit edited.

Visit Summary

Visit Information

Visit Name Reason for Visit
Visit Test Training

Start Date End Date
06/20/2022 06/29/2022

Determination **Access Type**
Secret Secret

Visit Description

Host Information

Hosting Organization
Defense Counterintelligence and Security Agency

Visit Address

Point of Contact

Requested Organizations

Organizations
Department of Security ...

Visitors

To approve or deny a visitor, select an option from the Status dropdown.

SSN	Name	Organization Name	Organization Code	Determination	Access Type	Status
No visitors at this time.						

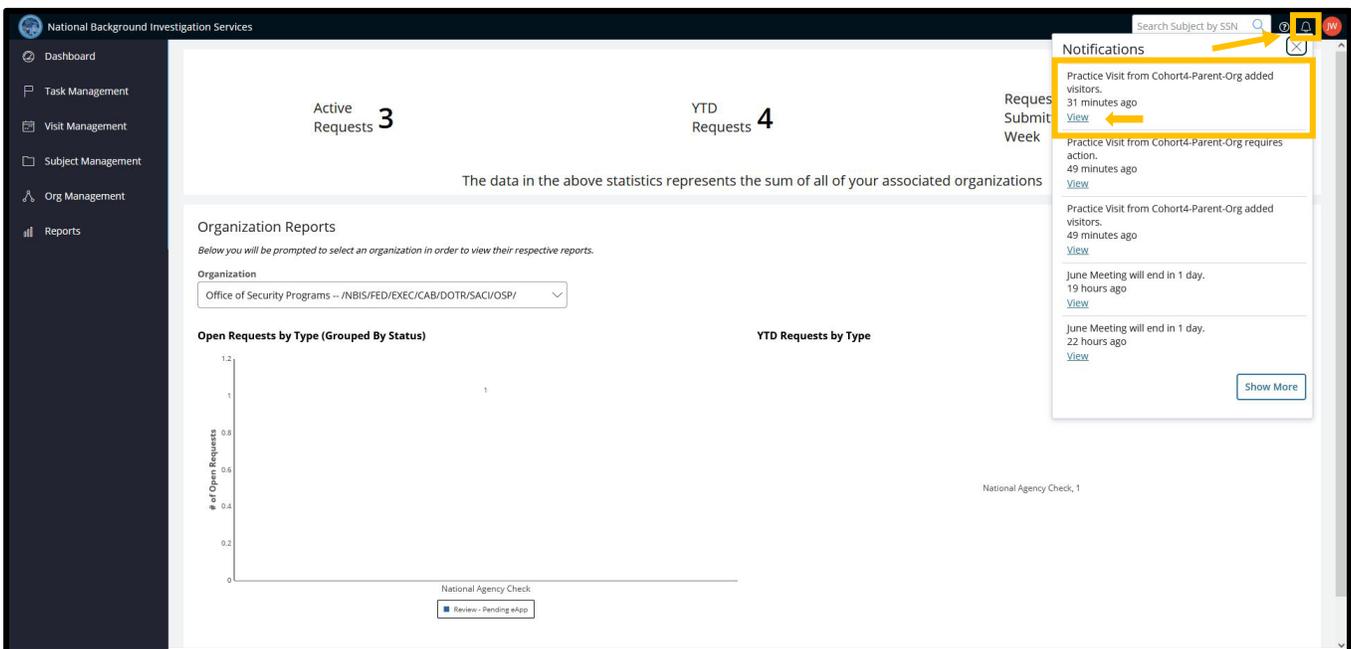
Close

How to Verify Receipt of a Notification After Changes to the Visit Request

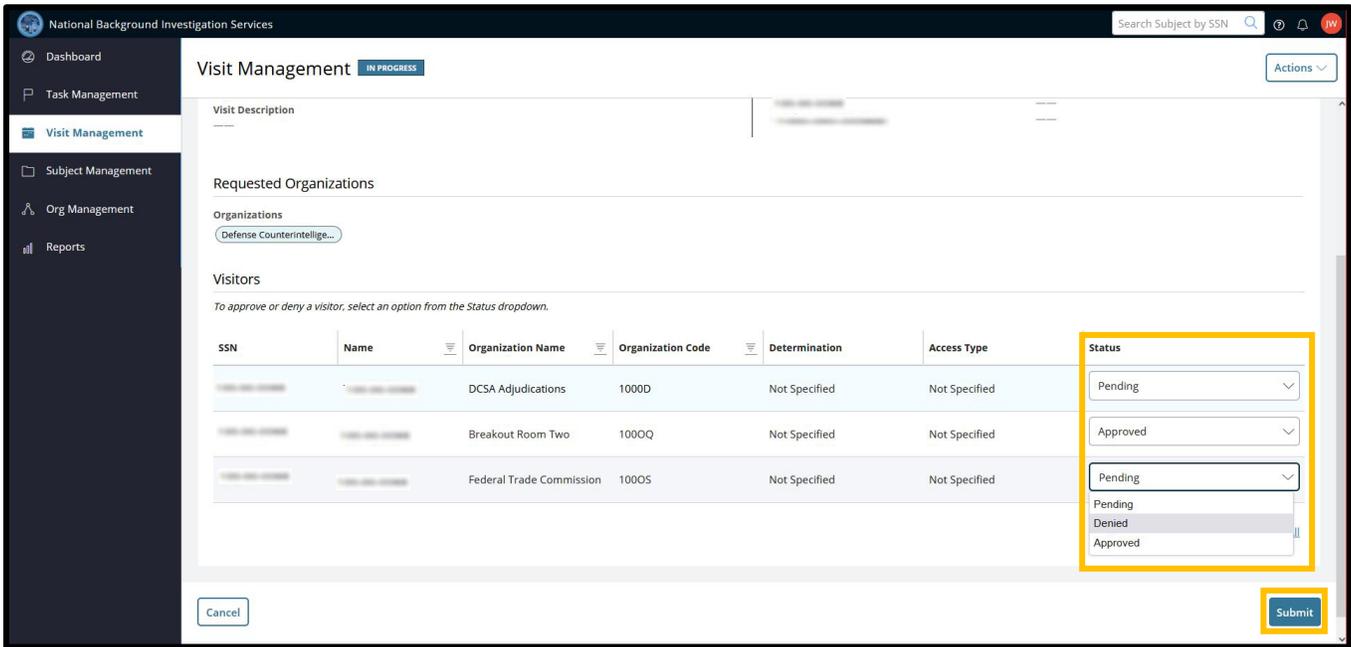
1. The first notification the host organization will receive will be an email stating that a change has been made to the event and which entity made that change.



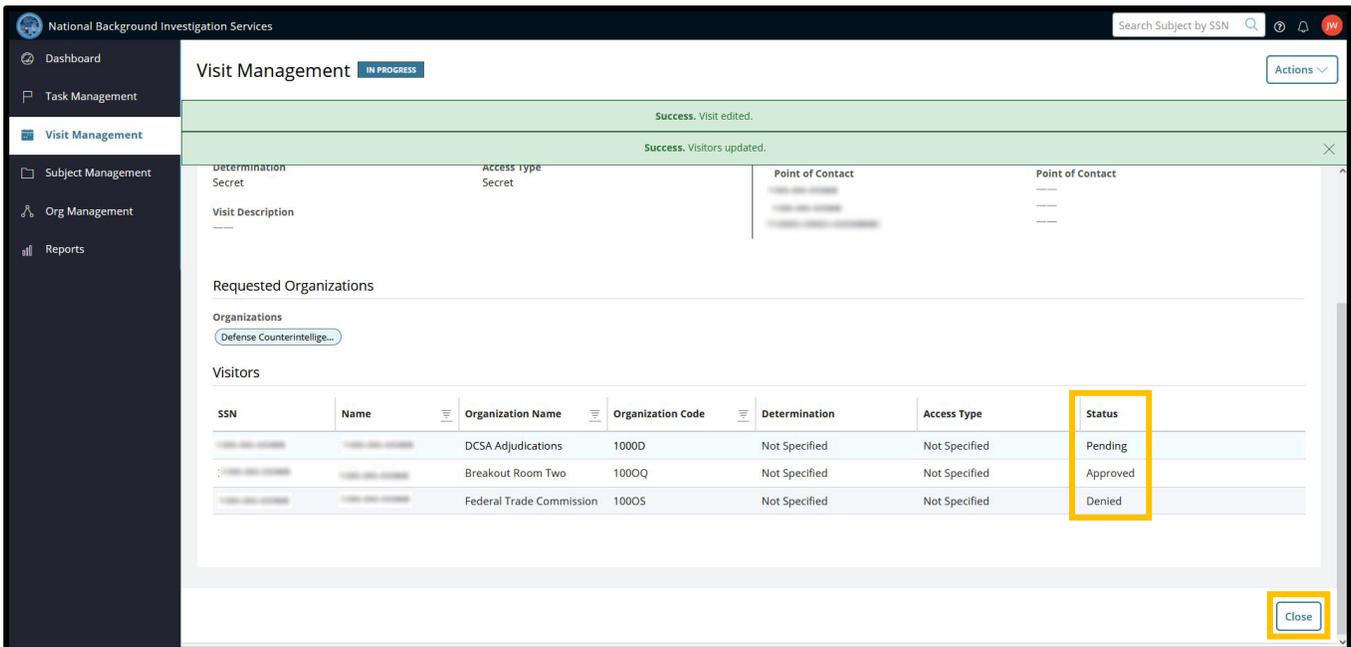
2. To verify the change, check if a new notification is waiting in the cue. Select the **bell** icon in the top right corner to open the Notifications inbox.
3. Select the **View** hyperlink on the hosted event notification.



- The hosting organization must approve or deny the visitors that have been added to the visit request. Select the **Pending** drop-down from the Status column.
- Select either **Approved** or **Denied** for each visitor.
- Select **Submit**.

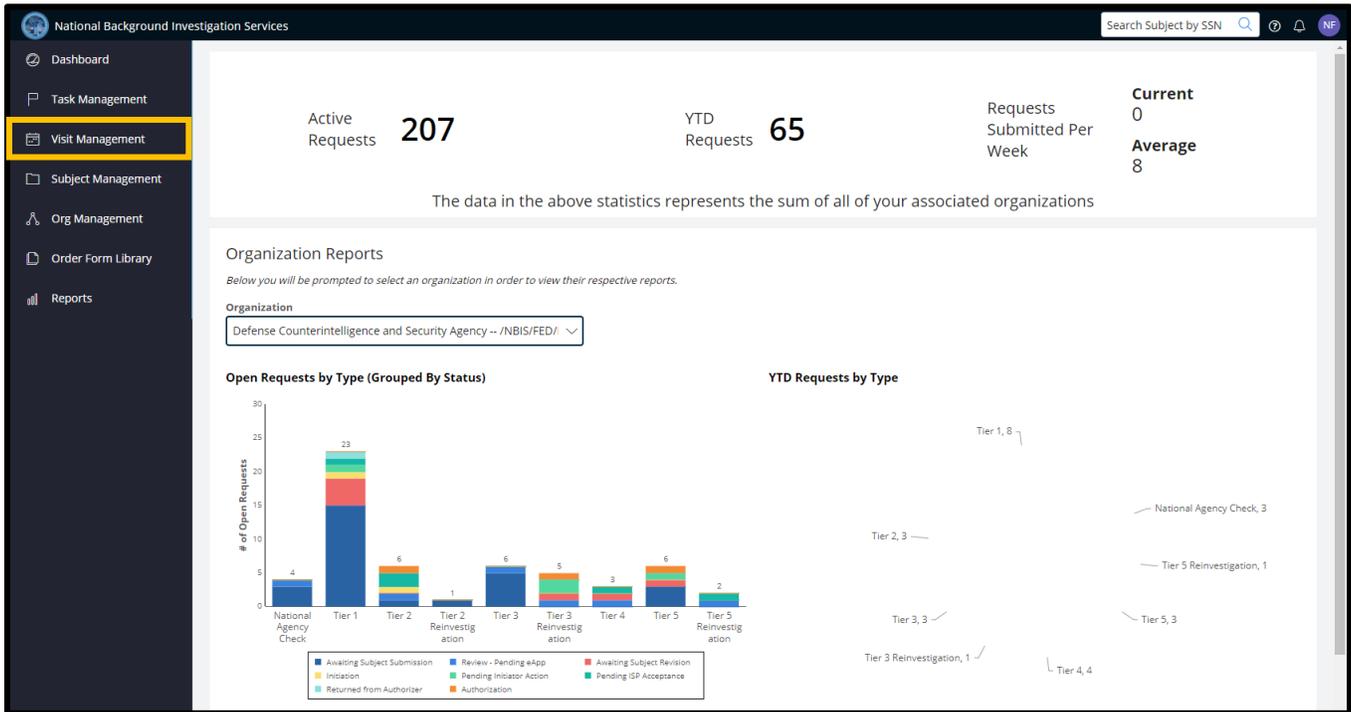


- Dual green success banners will appear to confirm the visit itself and that the list of visitors has been edited. Select **Close**.

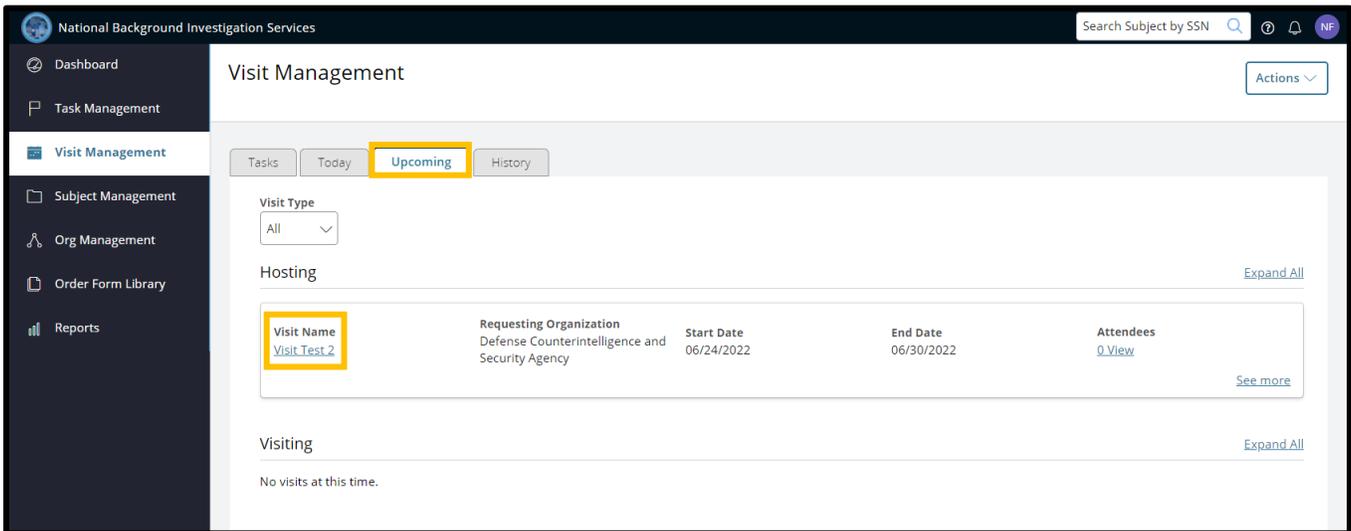


How to Add an Organization to an Existing Event

1. Select **Visit Management** from the Left Navigation Menu.

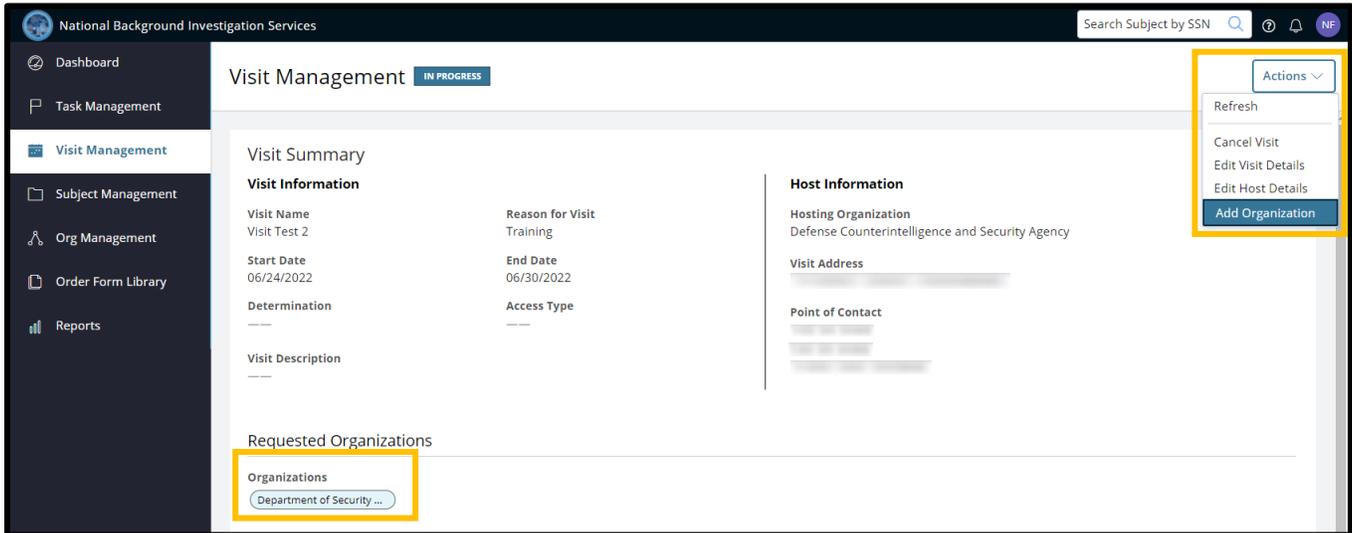


2. Select the **Upcoming** tab.
3. Select the **Visit Name** hyperlink from the Hosting section.



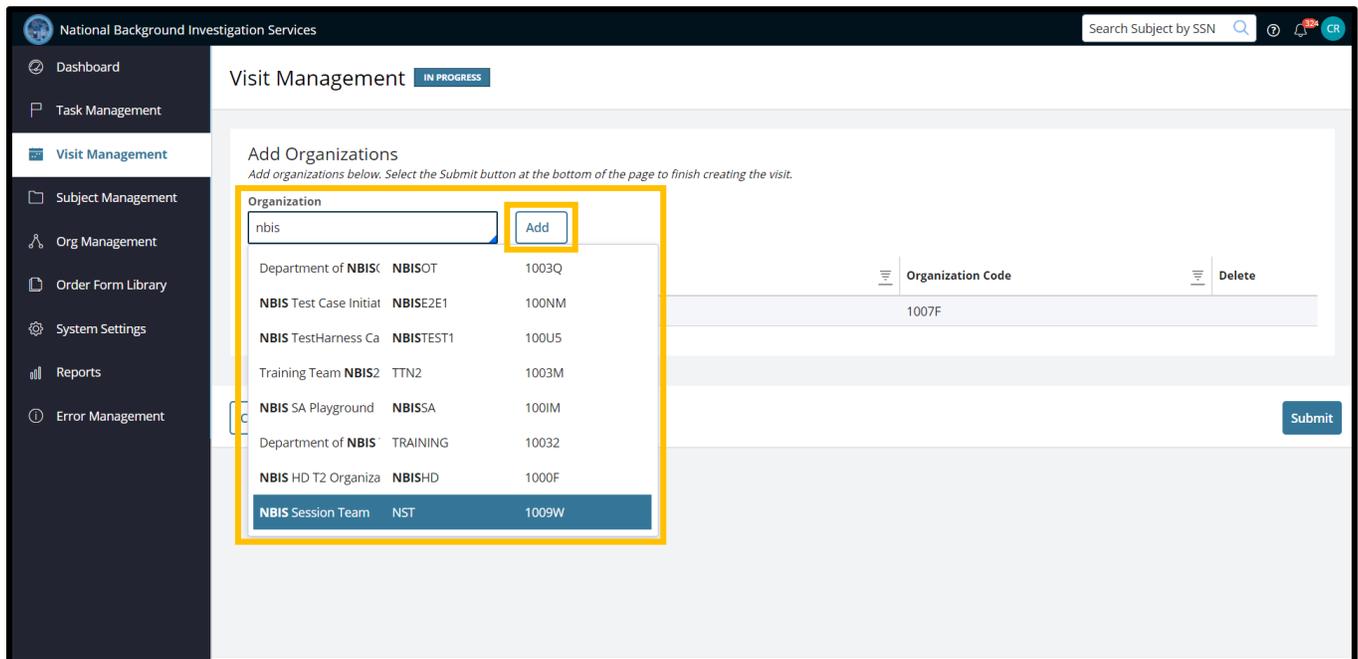
4. Select **Add Organization** on the Actions drop-down menu.

Note: The original requested organization when the visit was created appears under Requested Organizations.



5. Begin entering text in the Organization field and select the desired organization when it appears in the drop-down list.

6. Select **Add**.



7. The newly added organization will be added to the list under Organization. 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

Visit Management **IN PROGRESS**

Add Organizations

Add organizations below. Select the Submit button at the bottom of the page to finish creating the visit.

Organization

Select Organization... Add

Organization	Organization Code	Delete
Office of Security Programs	1007F	
NBIS Session Team	1009W	

Cancel Submit

8. A green success banner confirms the visit has been edited. Verify the information for accuracy. Select **Submit**.

Note: The newly added organization now appears under Requested Organizations.

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

Visit Management **IN PROGRESS**

Success Visit edited.

Visit Information

Visit Name: Sample Hosting Visit

Reason for Visit: Training

Start Date: 07/25/2022

End Date: 07/29/2022

Determination: Secret

Access Type: Secret

Visit Description: ---

Host Information

Hosting Organization: Defense Counterintelligence and Security Agency

Visit Address: 123 Main St Quantico, VT, 12345

Point of Contact: ---

Requested Organizations

Organizations

Office of Security Progra... NBIS Session Team

Visitors

To approve or deny a visitor, select an option from the Status dropdown.

SSN	Name	Organization Name	Organization Code	Determination	Access Type	Status
No visitors at this time.						

Approve All

Cancel Submit

9. The Submit button is replaced by the Close button. Select **Close** to return to the main Visit Management screen.

National Background Investigation Services

Search Subject by SSN

Visit Management **IN PROGRESS** Actions

Success. Visit edited.

Visit Summary

Visit Information

Visit Name Visit Test 2	Reason for Visit Training
Start Date 06/24/2022	End Date 06/30/2022
Determination ---	Access Type ---

Visit Description

Host Information

Hosting Organization
Defense Counterintelligence and Security Agency

Visit Address
123 Main Street Springfield, AR, 15554

Point of Contact

Requested Organizations

Organizations

Department of Security ... DEMO TEST ORG

Visitors

SSN	Name	Organization Name	Organization Code	Determination	Access Type	Status
No visitors at this time.						

Close

