



# VISIT MANAGEMENT: VISIT REQUEST FUNCTIONS

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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

	National Background Invest	stigation Services	Search Subject by SSN 🔍 🛛 🗘 NF
0	Dashboard		
Р	Task Management	Active 207 YTD CE Requests	<b>Current</b> O
Ō	Visit Management	Requests 207 Requests 65 Submitted Per Week	Average
	Subject Management	The data in the above statistics represents the sum of all of your associated organizations	-
ሌ	Org Management	The data in the above statistics represents the sum of an or your associated organizations	
٥	Order Form Library	Organization Reports	
0 <b>0)</b>	Reports	Below you will be prompted to select an organization in order to view their respective reports.  Organization  Defense Counterintelligence and Security Agency //NBIS/FED/1 ~/	
		Open Requests by Type (Grouped By Status) YTD Requests by Type	
		25 23 Tier 1, 8 1	
			- National Agency Check, 3
			Tier 5 Reinvestigation, 1
		o National Tier1 Tier2 Tier3 Tier3 Tier4 Tier5 Tier5 Tier3 Agency Reinvestig	🔨 Tier 5, 3
		Avaiding Subject Submission     Review - Pending eApp     Review - Pending Subject Revision     Initiation     Review - Pending Initiator Action     Review - Pending ISP Acceptance     Review - Re	

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 Inve	stigation Services				Search Subject by SSN	Q (?) 🖓 №
Ø	Dashboard	Visit Management					Actions $\checkmark$
Р	Task Management						
	Visit Management	Tasks Today Upcoming	History				
	Subject Management	Visit Type					
ሌ	Org Management	All 🗸					
٥	Order Form Library	Hosting					Expand All
00	Reports	Visit Name Hosting Visit Test	Requesting Organization Defense Counterintelligence and Security Agency	<b>Start Date</b> 07/05/2022	End Date 07/08/2022	Attendees <u>0 View</u>	
							See more
		Visiting					Expand All
		Visit Name Visit Request Test	Hosting Organization Department of Security Managers 1	<b>Start Date</b> 07/05/2022	End Date 07/08/2022	Attendees <u>0 View</u>	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 Inve	stigation Services							Search Subject by SSN	@ Q 🚺
	Dashboard	Visit Managor	IN PROGRESS							Actions
	Task Management			Access type		Point of Contac	t	Point of Contact		Actions
10	Visit Management	Visit Description								
Þ	Subject Management									
	Org Management	Requested Organ	nizations							
D	Order Form Library	Organizations								
	System Settings	Department of Security	()							
al	Reports	Visitors								
	Error Management	To add a visitor from ye	our organization, select the Ad	d Visitor link below. To remove	a visitor, select the trash can ico	n.				
		SSN	Name =	Organization Name	Organization Code	Determination	Access Type	Status		
				Department of Security Managers 1	1005P	Not Specified	Not Specified	Approved	0	
			100.00.000	Department of Security Managers 1	1005P	Not Specified	Not Specified	Denied		
				Department of Security Managers 1	1005P	Not Specified	Not Specified	Pending	Û	
		100.00.000	100.00.000	Department of Security Managers 1	1005P	Not Specified	Not Specified	Pending	<b>a</b>	
		+ Add Visitor								
		Cancel								Submit

How to Add Visitors to an Existing Visit

1. Select Visit Management from the Left Navigation Menu.

National Background Inv	estigation Services				Search Subject by SS	5N Q @ Q NF
Ø Dashboard						Â
🏳 Task Management	Activo		VTD	Req	Juests 1	t
📅 Visit Management	Requests	207	Requests	69 Sub Wee	mitted Per ek <b>Averag</b> e	e
Subject Management					7	
犬 Org Management		The data in the abo	ve statistics represents th	ne sum of all of your associate	ed organizations	
C Order Form Library	Organization Repo	orts				
ျို Reports	Below you will be prompted Organization Defense Counterintellige	to select an organization in ord	er to view their respective reports.			- 1
	Open Requests by Type	e (Grouped By Status)		YTD Requests by Type		
	30					
	25 23 Steenbay und 0 0 0 10 5 4	4	56	Tier 1.	.9 National Age Tier 5 Rein	ency Check, 3
	0 National Tier 1 Agency Check	1 Tier 2 Tier 3 T Reinvesti Rei gation g	3 Tier 3 Tier 4 Tier 5 Tier 5 Investi Reinvesti ation gation	Tier 3, 4	Tier 5, 3 Tier 4, 4	

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

	National Background Inve	stigation Services				Search Subject by SSN	Q 🕐 📭
0	Dashboard	Visit Management					Actions $\checkmark$
	Task Management						
15	Visit Management	Tasks Today Upcoming	History				
	Subject Management	Visit Type					
ሌ	Org Management	All 🗸					
۵	Order Form Library	Hosting					Expand All
oti	Reports	Visit Name Sample Hosting Visit	Requesting Organization Defense Counterintelligence and	Start Date 07/25/2022	End Date 07/29/2022	Attendees <u>0 View</u>	
			Security Agency				See more
		Visiting					Expand All
		Visit Name Sample Visit Request	Hosting Organization Office of Security Programs	Start Date 07/26/2022	End Date 07/28/2022	Attendees 0 View	
							See more

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

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

	National Background Inve	estigation Services									Search Subject by SSN	🔍 o 4 😡
	Dashboard	Visit Managem	In PROGRESS									Actions
	Task Management	Visit Wanagen										
-	Visit Management	Visit Summary										
<b>C</b> -1	Subject Management	Visit Information						Host Informat	ion			
*	Org Management	Visit Name Practice Visit		Reason for Vis Training	it			Hosting Organiz Office of Security	ation y Programs			
0	Order Form Library	Start Date 06/30/2022		End Date 06/30/2022				Visit Address	hington DC 20022			
ŵ	System Settings	Determination		Access Type				Point of Contact	mmBroll, DC, 20032	Point of Contact		
atl	Reports	Visit Description										
	Error Management											
		Requested Organ	nizations									
		Organizations										
		Conort4-Parent-Org										
		Visitors										
		To add a visitor from ye	our organization, select the A	dd Visitor link below. To rem	iove a visite	<i>tor, select the trash ca</i>	n icon.					
		SSN	Name =	Organization Name		ganization Code	Ŧ	Determination	Access Type	Status		
				Cohort4-Parent-Org	100	DPE		Not Specified	Not Specified	Approved	1	
		100.00.000	1000.000.00000	Cohort4-Parent-Org	100	DPE		Not Specified	Not Specified	Approved	٦	
		+ Add 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.

	National Background Inve	estigation Services					Se	earch Subject by SSN 🛛 📿	0 🗘 📭
Ø	Dashboard	Visit Managemer							
Р	Task Management	Determination Secret		Access Type Secret	Point of C	Contact	Point of Contact		^
	Visit Management	Visit Description							
ل ۸	Subject Management				I				
		Requested Organiza	ations						_
D	Order Form Library	Organizations							
oil	Reports	Contense counterinteingen	/						
		Visitors							
		To add a visitor, select "Add	Visitor". You should only a	add one visitor at a time.					
		Search by SSN	Search	h by First Name :h Subject by First Name	Search by Last Name Search Subject by Last Name	Q			
		SSN	First Name	Last Name	Organizati	on Name Organiza	ation Code Ad	ld Visitor	
					Federal Tra	ade Commission 100OS	Ad	ld Visitor	
		Cancel Back							Submit

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

	National Background Inves	tigation Services									Search Subject by SSN	0 🗘	NF
Ø	Dashboard	Visit Manager		ESS								Actions ~	7
	Task Management	visit manager											
1	Visit Management	Determination Secret			Access Type Secret			Point of Contac	:t	Point of Contac	ct		
	Subject Management	Visit Description											
	Org Management						1						
D	Order Form Library	Requested Org	anizations										
al	Reports	Organizations	lize										
		Visitors											
		To add a visitor from	your organization, s	elect the Add V	Visitor link below. T	o remove a visitor, select the	trash can icon.						
		SSN	Name	= Organi	ization Name \Xi	Organization Code 🔤	Determination		Access Type	Status			
				DCSA A	Adjudications	1000D	Not Specified		Not Specified	Pending	Û		
		1000-000-000888	100.00.0088	Breako	out Room Two	100OQ	Not Specified		Not Specified	Pending	Û		
				Federa Commi	al Trade lission	10005	Not Specified		Not Specified	Pending	Û		1
		+ Add Visitor											1
													į.
		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.

6	National Background Inve	stigation Services						Searc	th Subject by SSN 🔍	0 🗘 N	
Ø	Dashboard	Visit Manageme								Actions $\lor$	]
Ρ	Task Management										_
	Visit Management				Success. Visit edited						
~		VIET NORD		Poston for Unit	Success. Visitors upda	ted.				×	
	Subject Management	Sample Visit Request		Training		Office of Security Programs					^
ሌ	Org Management	Start Date 07/26/2022		End Date 07/28/2022		Visit Address 123 Main St Washington, DC, 2	20032				
۵	Order Form Library	Determination		Access Type Secret		Point of Contact		Point of Contact			ł
al.	Reports	Visit Description		Stort		100.00.000					
		Requested Organiz Organizations (Defense Counterintellige Visitors SSN	ations	Organization Name 👳	Organization Code 👳	Determination	Access Type	Status			
		100.00.0088	100.00.000	DCSA Adjudications	1000D	Not Specified	Not Specified	Pending			
		100.00.0088	100-00-0088	Breakout Room Two	100OQ	Not Specified	Not Specified	Pending			
		10.0.00		Federal Trade Commission	10005	Not Specified	Not Specified	Pending		Close	
										ciose	¥

### How to Cancel a Visit Request

	National Background Inve	stigation Services	Search Subject by SSN 🔍 🕢 🗘	NF
Ø	Dashboard			^
Р	Task Management	Active 207 YTD CF Requests	<b>Current</b> O	
	Visit Management	Requests 207 Requests 65 Submitted Per Week	Average	
	Subject Management		8	
ሌ	Org Management	The data in the above statistics represents the sum of all of your associated organizations		
٥	Order Form Library	Organization Reports		
0 <b>0)</b>	Reports	Below you will be prompted to select an organization in order to view their respective reports. Organization Defense Counterintelligence and Security Agency //NBIS/FED/ \viewsity		
		Open Requests by Type (Grouped By Status) YTD Requests by Type		
		25 23 Tier 1, 8 7		
		er 15 5 15 6 0 0 0 10 Tier 2, 3	National Agency Check, 3	
			— Tier 5 Reinvestigation, 1	
		National Tier1 Tier2 Tier3 Tier3 Tier4 Tier5 Tier5 Tier3,3	└── Tier 5, 3	
		Avaiting Subject Submission     Review - Pending Industor Action     Pending Industor Action     Review - Pending ISP Acceptance     Review - Review - Pending ISP Acceptance     Review -		

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

	National Background Inve	stigation Services			Search Subject by SSN	Q @ 4 NF
Ø	Dashboard	Visit Management				Actions $\checkmark$
Р	Task Management					
	Visit Management	Tasks Today Upcoming History				
	Subject Management	Visit Type				
ሌ	Org Management	All				
۵	Order Form Library	Hosting				Expand All
000	Reports	Visit Name Requesting O Visit Name Defense Cour Test Host Visit Security Agen	rganization Start Date terintelligence and 07/18/2022 cy	End Date 07/22/2022	Attendees <u>0 View</u>	
						See more
		Visiting				Expand All
		Visit Name Test Visit Request 1	ization Start Date f Security Managers 07/25/2022	End Date 07/29/2022	Attendees <u>0 View</u>	
						<u>See more</u>

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

	National Background Inve	stigation Services							Search Subject by S	sn C	V 🗘 🔍
Ø	Dashboard	Visit Manage	ement IN PRO	GRESS						- Г	Actions $\lor$
Р	Task Management	0								_	Refresh
	Visit Management	Visit Summa	ary								Cancel Visit
	Subject Management	Visit Informatio	on				Host Infor	mation			
ሌ	Org Management	Visit Name Test Visit Request	t	Reason for Vi Training	sit		Hosting Org Department	a <b>nization</b> t of Security Managers 1			
D	Order Form Library	Start Date 07/25/2022		End Date 07/29/2022			Visit Addres 200 rain lan	is e tampa, DE, 12332			
000	Reports	Determination		Access Type ——			Point of Cor	ntact	Point of Contact		
		Visit Description									
						I					
		Requested Or	rganizations								
		Organizations									
		Defense Counterir	ntellige)								
		Visitors									
		To add a visitor fro	om your organization,	. select the Add Visitor li	nk below. To remove a	visitor, select	the trash can ic	on.			- 1
		SSN	Name =	Organization $=$ Name	Organization Code	Determin	ation	Access Type	Status		
		No visitors at th	is time.								

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

	National Background Inve	estigation Services					Search Subject by SS	N Q @ Q NF
Ø	Dashboard	Visit Management	OGRESS					Actions $\checkmark$
P	Task Management	0						
	Visit Management	Visit Summary						
	Subject Management	Visit Information			Host Infor	mation		
ሌ	Org Management	Visit Name Test Visit Request	Reason for Visit Training		Hosting Org Department	anization t of Security Managers 1		
۵	Order Form Library	<b>Start Date</b> 07/25/2022	End Date 07/29/2022		Visit Addres 200 rain lan	s e tampa, DE, 12332		
000	Reports	Determination	Cance	l Visit			× Point of Contact	
		Visit Description	You are a	bout to cancel this visit.	Do you want to continue?	,		
							_	
		Requested Organizations				Continue	2	
		Organizations					-	
		Defense Counterintellige						
		Visitors						
		To add a visitor from your organizatio	on, select the Add Visitor link	below. To remove a vis.	itor, select the trash can ic	on.		
		SSN Name	Organization =	Organization =	Determination	Access Type	Status	
		No visitors at this time.						

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.

	National Background Inve	stigation Services							Search Subject by S	SN Q	0 Q NF
Ø	Dashboard	Visit Manage		LED							Actions $\lor$
Р	Task Management										
<b>a</b>	Visit Management				Success. \	isit cancelled.					×
	Subject Management	Visit Summai	-y								
ጸ	Org Management	Visit Informatio	n			Ho	ost Inform	mation			
~	Order Form Library	<b>Visit Name</b> Test Visit Request		Reason for Vis Training	sit	Ho De	sting Orga partment	a <b>nization</b> of Security Managers 1			
L		Start Date 07/25/2022		End Date 07/29/2022		Vis 200	sit Address	s tampa DE 12332			
oll	Reports	Determination		Access Type		Poi	int of Con	tact	Point of Contact		
		Requested Or	anizations								
		Organizations	5411240013								
		Defense Counterint	ellige								
		Visitors									
		To add a visitor fror	n your organization,	select the Add Visitor lir	nk below. To remove a vi	sitor, select the tra	ash can icc	ın.			
		SSN	Name =	Organization $=$ Name	Organization =	Determination		Access Type	Status		

How to Edit the Location of an Existing Hosted Event

<ul> <li></li></ul>	National Background Inve	stigation Services S	Search Subject by SSN 🔍 🕢 🔎
🙆 Da	ashboard		
Р та	ask Management	Active 207 YTD CF Requests	<b>Current</b> O
📅 Vi	isit Management	Requests 207 Requests 65 Submitted Per Week	Average
🗀 Su	ubject Management		8
s o	irg Management	The data in the above statistics represents the sum of all of your associated organizations	
D 01	order Form Library	Organization Reports	
<sub>0</sub> 0] Re	eports	Below you will be prompted to select an organization in order to view their respective reports. Organization Defense Counterintelligence and Security Agency /NBIS/FED/. <>	
		Open Requests by Type (Grouped By Status) YTD Requests by Type	
		20 25 23 8 20	
			- National Agency Check, 3
		Tier 2, 3	
			— Tier 5 Reinvestigation, 1
		National Tier1 Tier2 Tier3 Tier3 Tier4 Tier5 Tier5 Tier3 3 / Agency Reinvestig Reinvestig Reinvestig Check ation ation ation	∕_ Tier 5, 3
		Awationg Subject Submission     Review - Pending Industry Action     Initiation     Review - Pending Industry Action     Review - Pending Industry Action     Review - Pending Industry Action     Review - Pending ISP Acceptance     Review - Pending ISP Acceptance     Review - Pending ISP Acceptance     Review - Pending ISP Acceptance	

- 2. Select the Today or Upcoming tab.
- 3. Select a **hosting visit** hyperlink from the Visit Name column.

	National Background Inve	stigation Services				Search Subject by SSN	Q 🕐 🖓
Ø	Dashboard	Visit Management					Actions $\checkmark$
P	Task Management						
	Visit Management	Tasks Today Upcoming Hi	istory				
	Subject Management	Visit Type					
ሌ	Org Management	All					
۵	Order Form Library	Hosting					Expand All
08	Reports	Visit Name Req Hosting Visit Test Corr	uesting Organization ense Counterintelligence and	<b>Start Date</b> 07/05/2022	End Date 07/08/2022	Attendees <u>0 View</u>	
		Sect	unty Agency				See more
		Visiting					Expand All
		Visit Name Host Visit Request Test 1	ting Organization artment of Security Managers	<b>Start Date</b> 07/05/2022	End Date 07/08/2022	Attendees <u>0 View</u>	
							See more
						1	

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

	National Background Inve	stigation Services						Search Subject by S	sn Q	0 4 NF
Ø	Dashboard	Visit Manager								Actions $\checkmark$
Р	Task Management	0		-					Refres	n z
	Visit Management	Visit Summary	/						Close \ Edit Vie	/isit sit Details
	Subject Management	Visit Information				Host Information			Edit H	ost Details
ሌ	Org Management	Visit Name Hosting Visit Test		Reason for Visit Training		Hosting Organization Defense Counterintellig	ence and Security Agency		Add O	ganization
D	Order Form Library	Start Date 07/05/2022		End Date 07/08/2022		<b>Visit Address</b> 123 Main St Quantico, V	T, 12345			
000	Reports	Determination		Access Type		Point of Contact	Point o	f Contact		- 1
		Visit Description								- 1
						I				- 1
		Requested Orga	anizations							- 1
		Organizations	ity )							- 1
										- 1
		Visitors	visitor select an option	from the Status drondown						- 1
		to approve or deny a	visitor, serect an option							
		SSN	Name =	Organization Name $\Xi$	Organization Code	Determination	Access Type	Status		
		No visitors at this t	ime.							

- 5. Update the location data fields to reflect the new address for the hosted event.
- 6. Select **Submit**.

	National Background Inve	estigation Services			Search Subject by SSN	Q	0 Û	NF
Ø	Dashboard	Visit Management IN PROGRESS						
Р	Task Management	Provide Visit Address						-
	Visit Management	Street Address	Suite/Room					
	Subject Management	123 Main Street	Enter Suite/Room					
ሌ	Org Management	Building/Facility Enter Building/Facility						l.
D	Order Form Library	City	State					
all	Reports	Springfield	Arkansas ~					
		Zip Code						
		Point of Contact						
		Name 1*	Phone Number 1*	Email Address 1*				
			100.00.000					
		+ Add Another Point of Contact						
		Cancel					Subm	ít

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.

	National Background Inve	stigation Services						Search Subject by SSN	0 4 📭			
Ø	Dashboard	Visit Manageme							$\fbox{Actions} \lor$			
Р	Task Management				Success Visit edited.				×			
	Visit Management	Start Date		End Date		Mait Address			•			
	Subject Management	06/24/2022		06/30/2022		123 Main Street Springfield, A	R, 15554					
	Org Management	Determination ——		Access Type ——		Point of Contact						
۵	Order Form Library	Visit Description										
of	Reports											
		Requested Organia	zations									
		Organizations (Department of Security	Organizations (Department of Security)									
		Visitors										
		To approve or deny a visi	tor, select an option from th	e Status dropdown.								
		SSN	Name =	Organization Name	Organization Code $=$	Determination	Access Type	Status				
		No visitors at this time										
								As	prove All			
		Cancel							Submit			

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

Image: Dashbaard	Actions ~
Image: Task Management       Subject Management         Subject Management       Visit Summary         Visit Information       Visit Information         Visit Visit Visit Summary       Ford Porm Ubray         Imagement       Visit Visit Summary         Visit Summary       Visit Summary         Visit Information       Reson for Visit         Visit Test 2       Training         Subject Management       End Date         Of/GP Form Ubray       End Date         Imagement       End Date         Visit Test 2       Of/S02022         Determination       Access Type         Imagement       Visit Description         Requested Organizations       Point of Contect         Organizations       Suppriment of Secury	
■ Visit Management       Visit Summary         ▲ org Management       Visit Information         ● order Form Ubray       If Reports         ■ Reports       Visit Summary         ■ Requested Organizations       End Date         ■ requested Organizations       Point of Contact         ■ requested Organizations       If Requested Organizations         ● promet of Security-       Visitors	
Subject Management       Visit Summary         Norg Management       Visit Information         Norder Form Ubrary       Nisit Name       Reason for Visit         In Reports       Most Information       Most Information         Visit Visit Visit Cescription       End Date       Visit Address         Visit Description       Access Type       Point of Contact         Requested Organizations       Requested Organizations       Point of Contact         Visit Description       Visit Summary       Visit Summary         Visit Summary       Visit Summary       Visit Summary	
Visit Information     Host Information       Order Form Library     It Name     Reason for Visit       It Reports     Start Date     End Date       Obj/2022     Obj/30/2022     Visit Address       Determination     Access Type     Point of Contact       Visit Description	
Visit Name     Reason for Visit       Order Form Library     Visit Test 2       Il Reports     Start Date       End Date     Find Date       06/24/2022     06/30/2022       Determination     Access Type       Visit Description	
Start Date     End Date     Visit Address       06/24/2022     06/30/2022     06/30/2022       Determination     Access Type     Point of Contact       Visit Description     Image: Contact Contact     Image: Contact Contact       Requested Organizations     Image: Contact Contact     Image: Contact Contact       Visit Description     Image: Contact Contact     Image: Contact Contact       Visit Description     Image: Contact Contact     Image: Contact Contact       Visit Description     Image: Contact Contact Contact     Image: Contact Contact Contact       Visit Description     Image: Contact Con	
Determination Access Type Point of Contact Visit Description Requested Organizations Organizations Department of Security	
Requested Organizations Organizations Uppartment of Security Visitors	
Organizations Department of Security	
Vísitors	
SSN Name $\overline{\pm}$ Organization Name $\overline{\pm}$ Organization Code $\overline{\pm}$ Determination Access Type Status	
No visitors at this time.	

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

	National Background Inve	estigation Services	Search Subject by SSN 🔍 📀 🗘	NF
Ø	Dashboard			Î
Р	Task Management	Active 207 YTD CF Requests	<b>Current</b> O	l
	Visit Management	Requests 207 Requests 65 Submitted Per Week	Average	I
	Subject Management		8	1
ሌ	Org Management	The data in the above statistics represents the sum of all of your associated organizations		1
۵	Order Form Library	Organization Reports		1
0 <b>0</b> ]	Reports	Below you will be prompted to select an organization in order to view their respective reports. Organization Defense Counterintelligence and Security Agency //NBIS/FED/I >>		
		Open Requests by Type (Grouped By Status) YTD Requests by Type		
		30 25 23 11er 1, 8 7		
			- National Agency Check, 3	I
		₹ 10 ₩ 6 6 6 6	The E Delay astronom (	1
			The Dimensional Stranger	1
		National Tier1 Tier2 Tier3 Tier3 Tier4 Tier5 Tier5 Tier3,3 / Agency Reinvestig Reinvestig Reinvestig Tier3,3 / Check ation ation	🔨 Tier 5, 3	I
		Awaking Subject Submission     Review-Pending eApp     Avaking Subject Revision     Indiasion     Pending Indiastra Action     Pending ISP Acceptance     Authoritizet     Authoritizet		ĺ

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

	National Background Inve	stigation Services	Search Subject by SSN	Q Q Q NE
Ø	Dashboard	Visit Management		Actions
P	Task Management			
	Visit Management	Tasks Today Upcoming History		
Ľ	Subject Management	Visit Type	View	
ሌ	Org Management		Visits	Attendees
۵	Order Form Library	Hosting		
000	Reports	Visit Name         Requesting Organization         Start Date         End Date           Visit Test         Defense Counterintelligence and 06/20/2022         06/29/2022	Attendees <u>0 View</u>	
		Security Agency		See more
		Visit Name         Requesting Organization         Start Date         End Date           Visit Test         Defense Counterintelligence and Security Agency         06/21/2022         06/29/2022	Attendees <u>0 View</u>	5
				<u>See more</u>
		Visiting		
		No visits at this time.		

To update the security determination and access type to Secret:

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

	National Background Inve	estigation Services			Search Subject by	SSN 🔍 🕢 🔎
Ø	Dashboard	Visit Management	ROGRESS			$igsquare$ Actions $\lor$
Ρ	Task Management					Refresh
10	Visit Management	Visit Summary				Close Visit
	Subject Management	Visit Information		Host Information		Edit Host Details
ሌ	Org Management	<b>Visit Name</b> Visit Test	Reason for Visit Training	Hosting Organization Defense Counterintelligence and	d Security Agency	Add Organization
۵	Order Form Library	<b>Start Date</b> 06/20/2022	<b>End Date</b> 06/29/2022	Visit Address		
010	Reports	Determination ——	Access Type ——	Point of Contact	Point of Contact	
		Visit Description		THE REPORT		
		Requested Organizations				
		Organizations				
		Department of Security				

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

Note: All previously completed fields will remain filled out.

6. Select Submit.

6	National Background Inves	tigation Services	Search Subject by SSN Q	0 4 N	F
Ø	Dashboard	Visit Management IN PROCEESS			
	Task Management				4
	Visit Management	Visit Information Update visit information by completing the fields below. Select the Submit button at the bottom of the page to update the visit.			
þ	Subject Management	Visit Type Reason for Visit			
አ	Org Management	Visit Name *			
	Order Form Library	Visit Test			
•11	Reports	Visit Description			
		Start Date* End Date*			
		06/20/2022			
		Determination         Access Type           Secret         Secret			
		Hosting Organization Defense Counterintelligence and Security Agency			
		Cancel		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**.

9	National Background Inve	estigation Services						Search Subject by SSN	Q (?	
Ø	Dashboard	Visit Manager							A	tions 🗸
P	Task Management	visit managen								
	Visit Management				Success Visit edited.					×
دی	Subject Management	Visit Summary								
	Subject management	Visit Information			1	Host Information				
~	Org Management	Visit Name		Reason for Visit		Hosting Organization	nee and Committee Agence.			
۵	Order Form Library	Start Date		End Date		Visit Address	nce and security Agency			
000	Reports	06/20/2022		06/29/2022						
		Secret		Secret		Point of Contact				
		Visit Description								
					I					
		Requested Orga	nizations							
		Organizations	_							
		(Department of Securit	y)							
		Visitors								
		To approve or deny a	<i>visitor, select an option</i>	from the Status dropdown.						
		SSN	Name 👳	Organization Name \Xi	Organization Code \Xi	Determination	Access Type	Status		
		No visitors at this ti	me.		,					
									Approve	All
									CHUICVE	
									_	
		Cancel							s	ubmit

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

② Dashboard	Visit Management	IN PROGRESS							Actions $\checkmark$
P Task Management				Success. Visit	edited.				
Visit Management									Â
Subject Management	Visit Summary				1				- 1
റ്റ് Org Management	Visit Information Visit Name Visit Test		Reason for Visit		Hostin	Information g Organization se Counterintelligence and	d Security Agency		- 1
Order Form Library	Start Date 06/20/2022		End Date 06/29/2022		Visit A	ddress	a security Agency		- 1
10 Reports	Determination Secret		Access Type Secret		Point	of Contact			- 1
	Visit Description								- 1
	Requested Organization Organizations (Department of Security	ons							
	SSN	Name \Xi	Organization Name	Trianization Code	= Determin	nation	Access Type	Status	- 1
	No visitors at this time.								- 1
									- 1
									_
									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.

donotreply@nbis.mil NBIS Visit Management 12:58 PM Testing 123 from Department of Security Managers 1 made	Reply       Reply All G Forward         Image: All G Forward       Image: All G Forward         Image: All G Forward	12:58 PM	1
	Festing 123 from Department of Security Managers 1 made changes.		

- 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.

Rational Background Inve	estigation Services			Search Subject by SSN 🔍 👩 🕰 📖
② Dashboard				Notifications
Task Management     Visit Management	Active Pequett 3	YTD Pequests <b>4</b>	Reques Submit	Practice Visit from Cohort4-Parent-Org added visitors. 31 minutes ago <u>View</u>
Subject Management	The data in the at	bove statistics represents the sum of all of your associate	Week ed organizations	Practice Visit from Cohort4-Parent-Org requires action. 49 minutes ago <u>View</u>
ふ Org Management 』』 Reports	Organization Reports Below you will be prompted to select an organization in order to view their respective repu	zorts.		Practice Visit from Cohort4-Parent-Org added visitors. 49 minutes ago <u>View</u>
	Organization Office of Security Programs/NBIS/FED/EXEC/CAB/DOTR/SACI/OSP/			June Meeting will end in 1 day. 19 hours ago <u>View</u>
	Open Requests by Type (Grouped By Status)	YTD Requests by Type		June Meeting will end in 1 day. 22 hours ago <u>View</u>
	1			Show More
	und de la compara de la compar		National Agency C	nedi, 1
	National Agency Check Review - Pandrig elaps			

- 4. 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.
- 5. Select either **Approved** or **Denied** for each visitor.
- 6. Select Submit.

0	National Background Inve	stigation Services						Search Subject by SSN	0 0 😡
	Dashboard	Visit Manageme							Actions $\lor$
	Task Management	Visit Description							^
	Visit Management								
	Subject Management	Requested Organi	izations						
	Org Management	Organizations							
al	Reports	Defense Counterintellige.	)						
		Visitors							
		To approve or deny a visi	itor, select an option fr	om the Status dropdown.					
		SSN	Name	☐ Organization Name	Organization Code	<b>Ξ</b> Determination	Access Type	Status	
				DCSA Adjudications	1000D	Not Specified	Not Specified	Pending	$\overline{}$
		100.00.0008		Breakout Room Two	100OQ	Not Specified	Not Specified	Approved	
				Federal Trade Commission	100OS	Not Specified	Not Specified	Pending	
								Pending Denied Approved	
		Cancel							Submit

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

6	National Background Inve	stigation Services						Searc	h Subject by SSN		JW
0	Dashboard	Visit Managem								Actions	~
P	Task Management				Success. Visit edited						
	Visit Management				Success. Visitors updat	ed.					×
	Subject Management	Determination Secret		Access Type Secret		Point of Contact	Point	of Contact			^
x	Org Management	Visit Description									
ati	Reports										
010		Deguested Orga	nizations								
		Requested Organ	nizations								
		Defense Counterintelli	ge)								
P Task Management       Success. Visit edited.         Subject Management       Success. Visit of Contact         Subject Management       Secret         A Org Management       Secret         Visit Bescription       Image: Secret Secret         Visit Defense Counterintelinge       Visit Organizations         Organizations       Organizations         Organizations       Defense Counterintelinge         Visit Tors       SSN         Name       Organization Name         DCSA Adjudications       10000         Not Specified       Not Specified         State       Federal Trade Commission         Image: Pederal Trade Commission       10005											
		SSN	Name	= Organization Name =	Organization Code	Determination	Access Type	Status			
				DCSA Adjudications	1000D	Not Specified	Not Specified	Pending			
			100.00.000	Breakout Room Two	100OQ	Not Specified	Not Specified	Approved			
				Federal Trade Commission	100OS	Not Specified	Not Specified	Denied			
										Close	

How to Add an Organization to an Existing Event

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

National Background Inves	igation Services		Search Subject by SSN Q @ Q							
Ø Dashboard										
🏳 Task Management	Active	YTD	Current Requests 0							
📅 Visit Management	Requests 207	Requests 65	Submitted Per Week Average							
Subject Management	The data in the above st	tatistics concepts the sum of all of your accoriate	8							
人 Org Management	The data in the above st	taustics represents the sum of all of your associate	d organizations							
Drder Form Library	Organization Reports									
Below you will be prompted to select an organization in order to view their respective reports.  Organization  Defense Counterintelligence and Security Agency //NBIS/FED/I >>										
	Open Requests by Type (Grouped By Status)	YTD Requests by Type								
	25 23 88 20	1	Tier 1, 8 ]							
	0 0 0 0 0	Tier 2, 3	National Agency Check, 3							
		3 2	— Tier 5 Reinvestigation, 1							
	o National Tier 1 Tier 2 Tier 2 Tier 3 Tier 3 Ti Agency Reinvestig Reinvestig Check ation ation	ler 4 Tier 5 Tier 5 Reinvestig ation	∕_ Tier 5, 3							
	Avalong Subject Submission     Review - Pending eApp     Avalong Indiator Action     Review - Pending Indiator Action	alting Subject Ravision nding ISP Acceptance	/ Tier 4, 4							

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

	National Background Inve	estigation Services				Search Subject by SSN	Q (2) (2) (NF
Ø	Dashboard	Visit Management					Actions 🗸
Ρ	Task Management						
12	Visit Management	Tasks Today Upcoming His	story				
Ľ	Subject Management	Visit Type					
ሌ	Org Management	All 🗸					
۵	Order Form Library	Hosting					Expand All
080	Reports	Visit Name Requ Visit Test 2 Secu	esting Organization nse Counterintelligence and rity Agency	<b>Start Date</b> 06/24/2022	<b>End Date</b> 06/30/2022	Attendees <u>0 View</u>	
							See more
		Visiting					Expand All
							_

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

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

	National Background Inve	estigation Services			Search Subject by SSN	I Q	⑦ ↓ NF
Ø	Dashboard	Visit Management 🔊	ROGRESS		Г Г		Actions $\lor$
Р	Task Management					Refres	<u>ו</u>
	Visit Management	Visit Summary				Cancel Edit Vis	Visit it Details
٢٦	Subject Management	Visit Information		Host Information		Edit Ho	ost Details
_ 	Org Management	<b>Visit Name</b> Visit Test 2	Reason for Visit Training	Hosting Organization Defense Counterintelligence and Security Agency	[	Add O	rganization
۵	Order Form Library	<b>Start Date</b> 06/24/2022	End Date 06/30/2022	Visit Address			
o0(	Reports	Determination	Access Type	Point of Contact			
		Visit Description		The second secon			
		Requested Organizations					
		Organizations Department of Security					

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

	National Background Inve	estigati	on Services					Search Subject by SSN	I Q 0	Ç <sup>824</sup> CR
Ø	Dashboard	Vi	sit Managemei							
	Task Management									
	Visit Management		Add Organization	IS Select the Submit bu	tton at the bottom of the page t	o finish creating the visit.				
	Subject Management		Organization							
ጼ	Org Management		nbis		Add					
۵	Order Form Library		Department of <b>NBIS</b> (	NBISOT	1003Q	≣	Organization Code	Ē	Delete	
Â	System Settings		NBIS Test Case Initiat	NBISE2E1	100NM		1007F			
<i>1</i> 24	system settings		NBIS TestHarness Ca	NBISTEST1	100U5					
o0 <b>0</b>	Reports		Training Team NBIS2	TTN2	1003M					
(i)	Error Management	ſ	NBIS SA Playground	NBISSA	100IM					Submit
		<u> </u>	Department of NBIS	TRAINING	10032					
			NBIS HD T2 Organiza	NBISHD	1000F					
			NBIS Session Team	NST	1009W					

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

	National Background Inve	Search Subject by SSN	Q 0	↓ <sup>324</sup> CR									
Ø	Dashboard	Visit Management IN PROGRESS											
	Task Management												
	Visit Management	Add Organizations Add organizations below. Select the Submit button at the bottom of the page to finish creating the visit. Organization Select Organization											
	Subject Management												
ጼ	Org Management												
٥	Order Form Library	Organization 🛒	Organization Code	≡	Delete								
6	System Settings	Office of Security Programs	1007F										
τ¢3		NBIS Session Team	1009W		Û								
000	Reports												
	Error Management												
		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 Inve	stigation Services Se									N Q @ 🖓 👁
Ø	Dashboard	Visit Management W MOGRESS								Actions $\checkmark$	
P	Task Management	Success Visit edited,								×	
	Visit Management	Visit Information					1	Host Information			
	Subject Management	Visit Name Sample Hosting Visit		Reason for Visit Training				Hosting Organization Defense Counterintelligence an	d Security Agency		
ሌ	Org Management	<b>Start Date</b> 07/25/2022		End Date 07/29/2022				Visit Address 123 Main St Quantico, VT, 1234	5		
٥	Order Form Library	Determination Secret		Access Type Secret				Point of Contact			
Ø	System Settings	Visit Description									
c00	Reports										
	Error Management	Requested Organizations									
		Organizations (Office of Security Program.) (NBIS Session Team)									
		Visitors									
		To approve or deny a visitor, select an option from the Status dropdown.									
		SSN	Name	Organization Name	Ŧ	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 Inve	stigation Services							Search Subject by SSN	2 0 4 📭
Ø	Dashboard	Visit Managem								Actions $\checkmark$
	Task Management	sk Management								
-	Visit Management	Success. Visit edited.								
		Visit Summary								<b>^</b>
	Subject Management	Visit Information					Host Information			
ሌ	Org Management	Visit Name Visit Test 2		Reason for Visit Training			Hosting Organization Defense Counterintelligenc	e and Security Agency		
۵	Order Form Library	Start Date 06/24/2022		End Date 06/30/2022			Visit Address 123 Main Street Springfield	, AR, 15554		
a <b>ti</b>	Reports	Determination		Access Type			Point of Contact			
		Visit Description								
	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

