|  |  |  |
| --- | --- | --- |
| User Role Matrix | | |
| **NBIS Release Version:** 4.0 | **Updated Date:** 04/19/2022 | **File ID:** REF-006 |

|  |  |  |  |
| --- | --- | --- | --- |
| **NBIS USER ROLE** | **RESPONSIBILITY** | **WHAT SECTION**(s) **USER ROLE CAN ACCESS** | **ORG TYPE AVAILABLE** |
| **Adjudicator** | Can access and select Guidelines to complete an adjudication case. Adjudicator role needs to be paired with the Case Processor role to adjudicate a case. | Case Worksheet – Guidelines tab | Adjudication, Component Adjudication |
| **Appeals Processor** | Can complete Appeals information on a case. Appeals role needs to be paired with the Case Processor role to complete appeal actions. | Case Worksheet – Appeals Guidelines Tab | Appeals |
| **Authorizer** | Can review entire case requests, completing ﬁnancial details, editing certain order form details if needed, and deciding whether to approve, reject, or hold cases. Also, can create & search for subjects. | Subject Management, Task Management, Order Form, Global Search | Authorize |
| **Case Processor** | Can processes cases and be paired with other roles to provide additional capabilities. This role has access to view & edit a subject’s profile by accessing it from the Subject Banner in a case. | Task Management, Case Worksheet, Global Search | Adjudication, Appeals, Screening, Component Adjudication, Vetting |
| **Component Adjudicator** | Can view Case Information tab on the worksheet for cases in the Component Adjudication phase. Needs to be paired with the Adjudicator & Case Processor roles to complete adjudicative actions. Can grant determinations from the Subject Profile tab. Needs to be paired with roles that can view Subject Management to access Subject Management. | Case Worksheet - Case Information Tab,  Subject Management | Component Adjudication |
| **CV Analyst** | Can view and process CV alerts. The user is responsible for processing the CV cover case which contains the data of all validated alerts and managing the Issue Tags. Needs to be paired with Case Processor to access the case. | Task Management | Vetting |
| **Enrollment Manager** | Can manually enroll & unenroll subjects from a Continuous Vetting program. Has the ability to search for & create subjects and view their information in the Subject Profile & History. | Global Subject Search,  Subject Worksheet | Vetting |
| **Facility Security Officer (FSO)** | Can manage subjects and complete actions like initiating case requests, complete mass initiation or affiliation for subjects, manually create service catalog requests to their Service Provider, add/edit subject’s PII, manage contractor affiliations, manage access, complete appeals, complete adjudication sub-tasks, and submit visit requests for subjects. Can also create, edit, request, and approve visit events. Can manually reassign tasks to users in their org. | Task Management, Subject Management, Global Search, Visit Management | Facility Security Office |
| **Initiator** | Can initiate subject case requests and complete Routing details, edit certain order form details before receiving the subject’s SF back from eApp, and create & search for subjects. Can complete mass initiation or affiliation for subjects. | Dashboard, Task Management, Order Form, Global Search | SSC |
| **NBIS Financial Manager** | Can manage SON/SOI and SON/IPAC relationship tables, and IPAC, IPAC Exemption, TAS, and BETC codes at a global NBIS level. | System Settings | Not linked to a specific org type. Can only be added to an org by the Onboarding Manager. |
| **Notification Manager** | Can create and manage notifications related to the case completion processes, to be sent out to organization users or subjects. | Organization Management | Adjudication, Appeals, Authorize, Component Adjudication, Facility Security Office, Review, Screening, SSC, Vetting |
| **Onboarding Manager** | Can manage Org Levels and create orgs with grouped Org Levels. This role also has permissions to add any function or org type to an org regardless of inherited restrictions. Also has permissions to add certain roles to orgs, regardless of org type. | System Settings, Organization Management | Not linked to a specific org type. Can only be added to an org by the Onboarding Manager. |
| **Operations Manager** | Can manage certain Org Configurations tab. Has access to Reports and all tabs in Task Management. | Organization Management, Reports, and Task Management | Adjudication, Appeals, Screening, Vetting |
| **Order Form Template Manager** | Can manage the Order Form Templates for their organization(s). | Order Form Library | Authorize, Facility Security Office, Review, SSC |
| **Org Assignment Manager** | Can manage Assignment Rules for their organization(s). | Organization Management | Adjudication, Appeals, Authorize, Component Adjudication, Facility Security Office, Review, Vetting |
| **Org Manager** | Can manage Details & Hierarchy for their organization(s). | Organization Management | Adjudication, Authorize, Appeals, Component Adjudication, Facility Security Office, Review, Screening, SSC, Vetting |
| **Org Relationship Manager** | Can manage org relationships that are established between organizations outside each other’s hierarchy or servicing relationships to orgs in your hierarchy, in the Org Relationship tab. | Organization Management | Not linked to a specific org type. Can only be added to an org by the Onboarding Manager. |
| **Org Workload Manager** | Can manage skillsets of users in their organization and manually assign cases to users within their organization(s). | Task Management,  Organization Management | Adjudication, Appeals, Authorize, Component Adjudication, Facility Security Office, Review, Screening, Vetting |
| **Polygraph** | Can add, edit, and remove polygraph entries from a given subject. Needs to be paired with roles that can view Subject Management to access Subject Management. | Subject Management | Not linked to a specific org type. Other than in an Adjudication org, this role can only be added to an org by the Onboarding Manager. |
| **Program Tag Manager** | Can manage the program tags that are available for their organization(s). | Organization Management | Adjudication, Appeals, Authorize, Component Adjudication, Facility Security Office, Review, Screening, SSC |
| **Reviewer** | Can review the subject’s standard form, accept, or rejecting subject responses, and add attachments. If rejecting they can also add comments and re-route the case back to the subject. Can also create & search for subjects. | Subject Management, Task Management, Order Form, Global Search | Review |
| **Screener** | Can Manage Interim Determinations from the Subject Profile. Has access to My Subject List to view subjects in their organizational hierarchy and subjects in orgs that have a Screening org relationship with their org. | Subject Management | Screening |
| **Special Security Officer (SSO)** | Can manage certain Access Levels and Interim Determinations for subjects. The Access Levels & Determinations they manage are controlled by the System Manager. Needs to be paired with the Subject Manager to gain access to Subject Management. | Subject Management | Not linked to a specific org type. Can only be added to an org by the Onboarding Manager. |
| **Subject Manager** | Can manage subjects and complete actions like initiating case requests, manually create service catalog requests for their service provider, complete adjudication sub-tasks, add/edit subject’s PII, affiliations, access, and complete appeals and visit requests for subjects. Can also create, edit, request, and approve visit events. Can manage interim determinations from the subject profile. | Task Management, Subject Management, Global Search, Order Form, Visit Management, Reports | SSC |
| **Subject Profile Editor** | Can update subjects' SSN or other PII data in the subject profile if needed. Can view Subject Worksheet tabs and reset the subject’s eApp password. | Subject Management, Global Search, Task Management | Not linked to a specific org type. Can only be added to an org by the Onboarding Manager. |
| **Subject Viewer** | Can view subject information from within Subject Management. Can view visit information within Visit Management. | Subject Management, Global Search, Task Management, Visit Management | Authorize, Facility Security Office, Review, SSC |
| **System Manager** | Can manage System Settings, org hierarchies, org details, users, and workflows. | System Settings, Organization Management, Task Management | Not linked to a specific org type. Can only be added to an org by the Onboarding Manager. |
| **Task Reassignment** | Can reassign cases to users within their team or, if unassigned to a team, to others who are unassigned within their organization from within the Order Form.Needs to be paired with either Initiator, Reviewer, or Authorizer. | Order Form, Task Management | Adjudication, Appeals, Authorize, Component Adjudication, Facility Security Office, Review, Screening, Vetting |
| **Team Manager** | Can manage user skillsets and access My Team’s Work in Task Management to assign cases. Can view the hierarchy and details of a team. Ability to reopen closed cases. | Task Management, Organization Management | Adjudication, Appeals, Screening, Vetting |
| **Team Structure Manager** | Can manage the structure and details of teams within organizations. Can add, remove, and reassign users to teams. | Organization Management | Adjudication, Appeals,  Screening, Vetting |
| **User Manager** | Can create and manage users within their organization(s). | Organization Management | Adjudication, Appeals, Authorize, Component Adjudication, Facility Security Office, Review, Screening, SSC, Vetting |
| **Workflow Manager** | Can create, modify, or disable a workflow, specifically in the Form Routing tab. | Organization Management | Authorize, Facility Security Office, Review, SSC |