



Reference File



User Role Matrix

NBIS Release Version: 3.3

Updated Date: 02/25/2022

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 – Grant Determinations	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





Reference File



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	<u>All Org Types</u>
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	<u>All Org Types</u>
Org Relationship Manager	Can manage org relationships that are established between organizations outside each other's hierarchy or servicing	Organization Management	Not linked to a specific org type. Can only be added to





Reference File



	relationships to orgs in your hierarchy, in the Org Relationship tab.		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.	Polygraph section in Subject Worksheet	Other than for Adjudication Org Type, 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	<u>All Org Types</u>
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.





Reference File



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	<u>All Org Types</u>
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	<u>All Org Types</u>
Team Structure Manager	Can manage the structure and details of teams within organizations. Can add, remove, and reassign users to teams.	Organization Management	<u>All Org Types</u>
User Manager	Can create and manage users within their organization(s).	Organization Management	<u>All Org Types</u>
Workflow Manager	Can create, modify, or disable a workflow, specifically in the Form Routing tab.	Organization Management	Authorize, Facility Security Office, Review, SSC

