



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID 

NBIS I-R-A ORG CONFIGURATIONS JOB AID

v1

Abstract

This is a compilation of the NBIS I-R-A related organization management job aids.

DCSA

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Version Control/Change Log

Version 1	Jun 06, 2022	Created	



BASIC NAVIGATION

HOW TO LOGIN TO NBIS

Purpose and Overview: All users must be provisioned in NBIS prior to logging in. Review the NBIS PSSAR & User Provisioning Instructions for additional details on how to request or add new user accounts. For users with current access, the 5-step process below provides instructions for logging into NBIS.

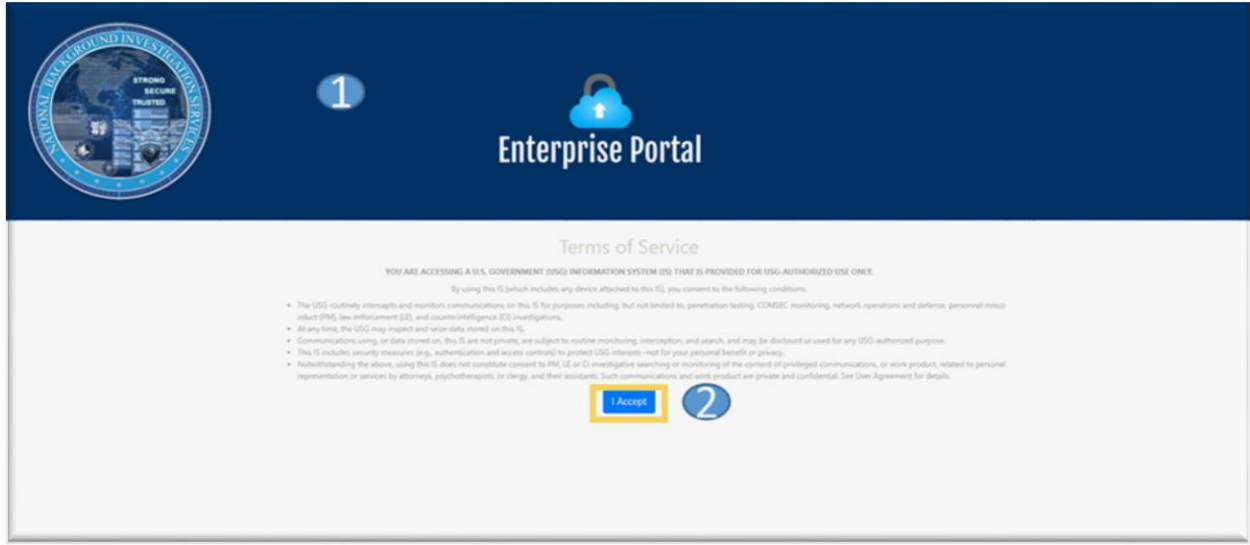
1. From your browser, enter vetting.nbis.mil in the URL bar. The NBIS Enterprise Portal homepage will load.
 - a. **Note:** Only updated versions of Chrome and Edge may be used to access the NBIS Portal.
2. Review the Terms of Service and select **I Accept**.
3. Choose **Select Certificate**.
4. Select the certificate from the **Choose a certificate to present as identification** drop-down to login to your assigned organization.
 - a. **Note:** The certificate selected must match the previous certificate used in the enrollment process.
5. If your certificate is associated to a single Agency user account (Organization), you will be directly logged into the NBIS Enterprise Portal and have access to your assigned organization and role assignment.
 - a. **Note:** If you have more than one enrolled Persona you will have an option to choose which enrolled certificate to log into. You are then routed to the assigned Organization(s) to choose the Organization to access within the NBIS Enterprise Portal. After selecting an organization, you will be logged into the NBIS Enterprise Portal and have access to the selected organization and role assignment.



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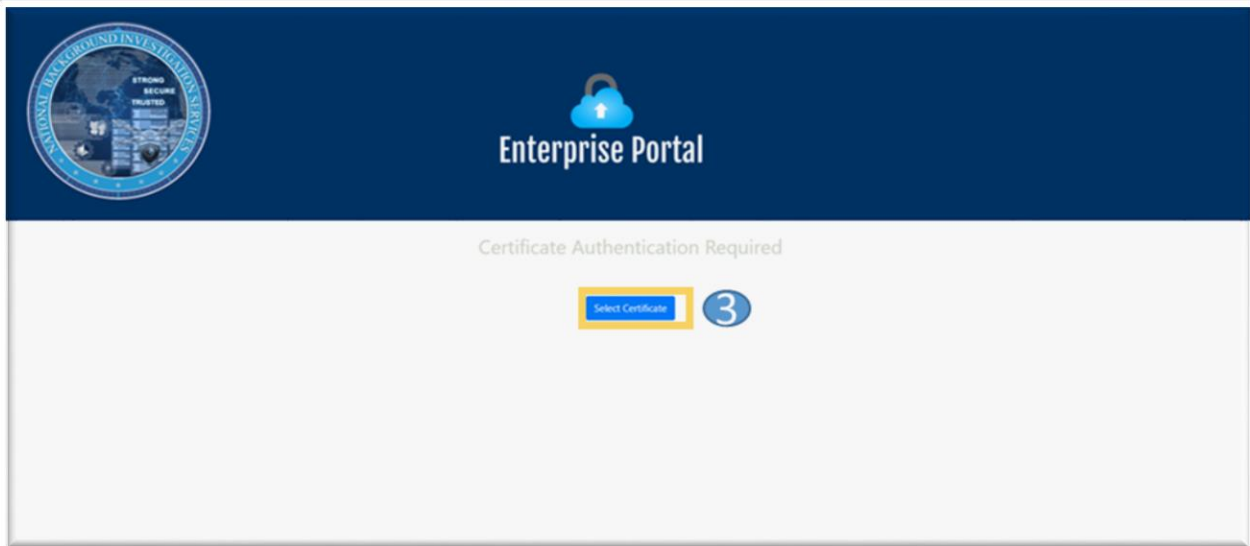
JOB AID

Step 1 – 2



The screenshot shows the 'Enterprise Portal' login page. At the top left is the DCISA seal. To its right is a large blue circle with the number '1'. Further right is a blue cloud icon with a white padlock and an upward arrow. Below the cloud icon is the text 'Enterprise Portal'. Underneath this is a section titled 'Terms of Service' with a warning: 'YOU ARE ACCESSING A U.S. GOVERNMENT (USG) INFORMATION SYSTEM (IS) THAT IS PROVIDED FOR USG-AUTHORIZED USE ONLY.' This is followed by a list of conditions of use. At the bottom of the terms section is a blue button labeled 'I Accept' and a blue circle with the number '2'.

Step 3



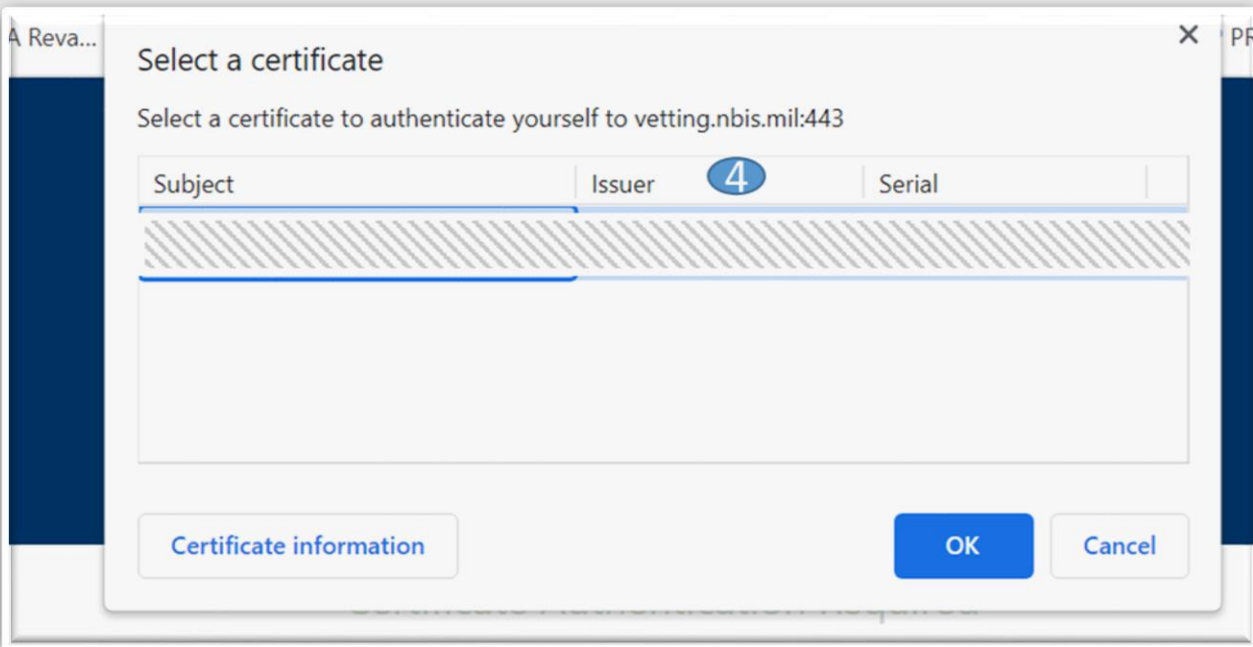
The screenshot shows the 'Enterprise Portal' login page. At the top left is the DCISA seal. To its right is a large blue circle with the number '3'. Further right is a blue cloud icon with a white padlock and an upward arrow. Below the cloud icon is the text 'Enterprise Portal'. Underneath this is a section titled 'Certificate Authentication Required'. At the bottom of this section is a blue button labeled 'Select Certificate' and a blue circle with the number '3'.



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Step 4



A Reva...

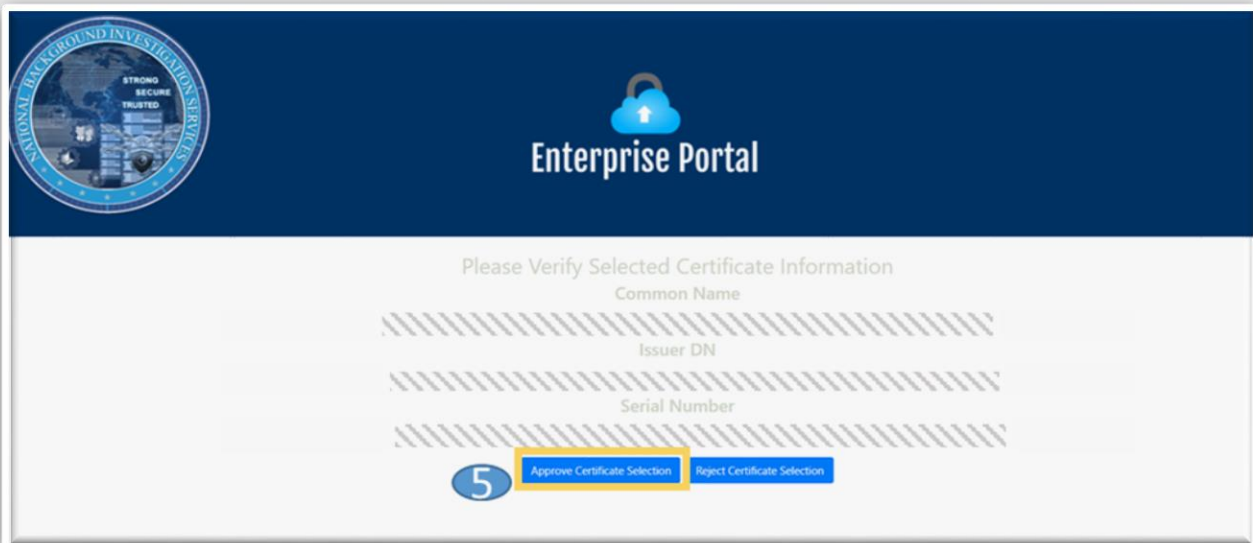
Select a certificate


Select a certificate to authenticate yourself to vetting.nbis.mil:443

Subject	Issuer	Serial

[Certificate information](#) **OK** **Cancel**

Step 5





Enterprise Portal

Please Verify Selected Certificate Information

Common Name

Issuer DN

Serial Number

5 **Approve Certificate Selection** **Reject Certificate Selection**



HOW TO ACCESS USER PROFILES

Purpose and Overview: Users have access to view their profile details; however, a user cannot make edits to their own profile. Users with the User Manager role can perform edits to another user's profile including updating PII & contact information, managing persona settings, to include adding/removing orgs & user roles within orgs, and user assignments. The User Manager role and capabilities will be covered in the User Management section of this document.

Below is the 4-step process that users can follow to view their profile details:

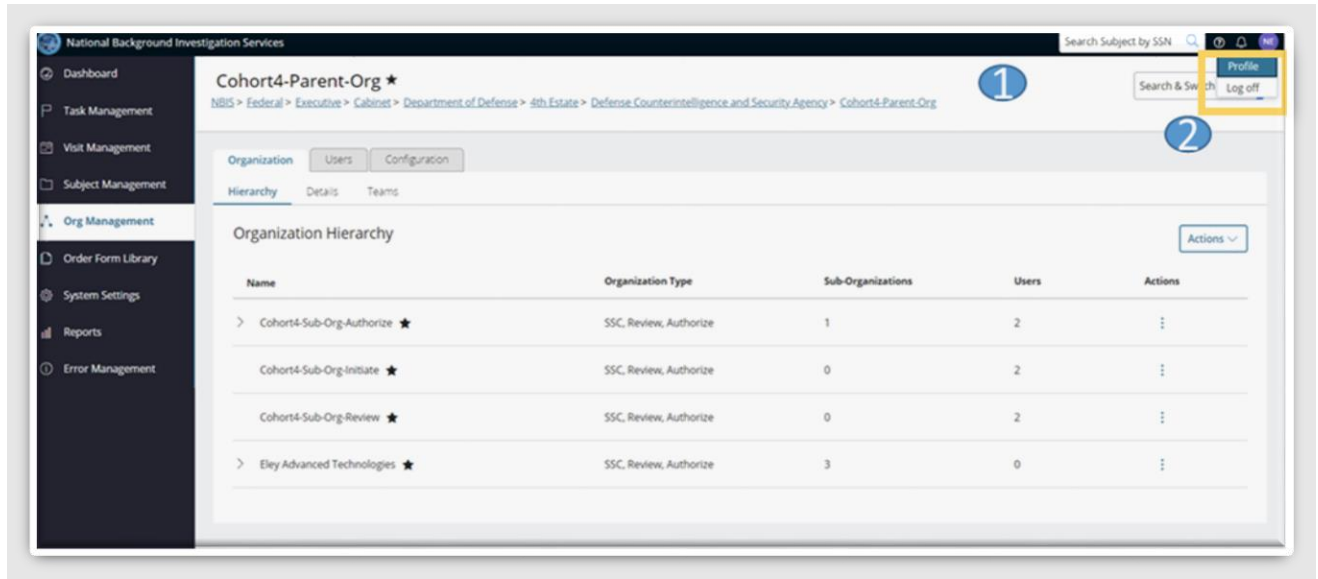
1. After initial log in, users can [select their initials](#) in the upper right-hand portion of the screen.
2. After users select their initials, a drop-down menu will appear displaying "Profile" and "Log Off." Select [Profile](#).
3. After users select Profile, the My User Profile screen will appear displaying the user's Personal Identifiable Information (PII) and the Persona(s) linked to the user's account.
4. To view the org(s) affiliated with your persona, the role(s) you have within the org(s), &/or the user assignments you have within each org, select the [Persona Name](#) (hyperlink).
 - a. The Manage Persona Settings tab will display your contact information, notification preferences, time zone, attachments (PSSAR & required training certificates), the org(s) your persona is affiliated with, and the role(s) you have within the org.
 - b. The Manage User Assignments tab will display the user assignments associated with each org.
 - i. Use the Organization drop-down menu to select a different org and view your user assignments within that org.



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Steps 1-2



1

2

Search Subject by SSN

Search & Switch

Profile

Log off

Cohort4-Parent-Org ★

NBIS > Federal > Executive > Cabinet > Department of Defense > 4th Estate > Defense Counterintelligence and Security Agency > Cohort4-Parent-Org

Organization Users Configuration

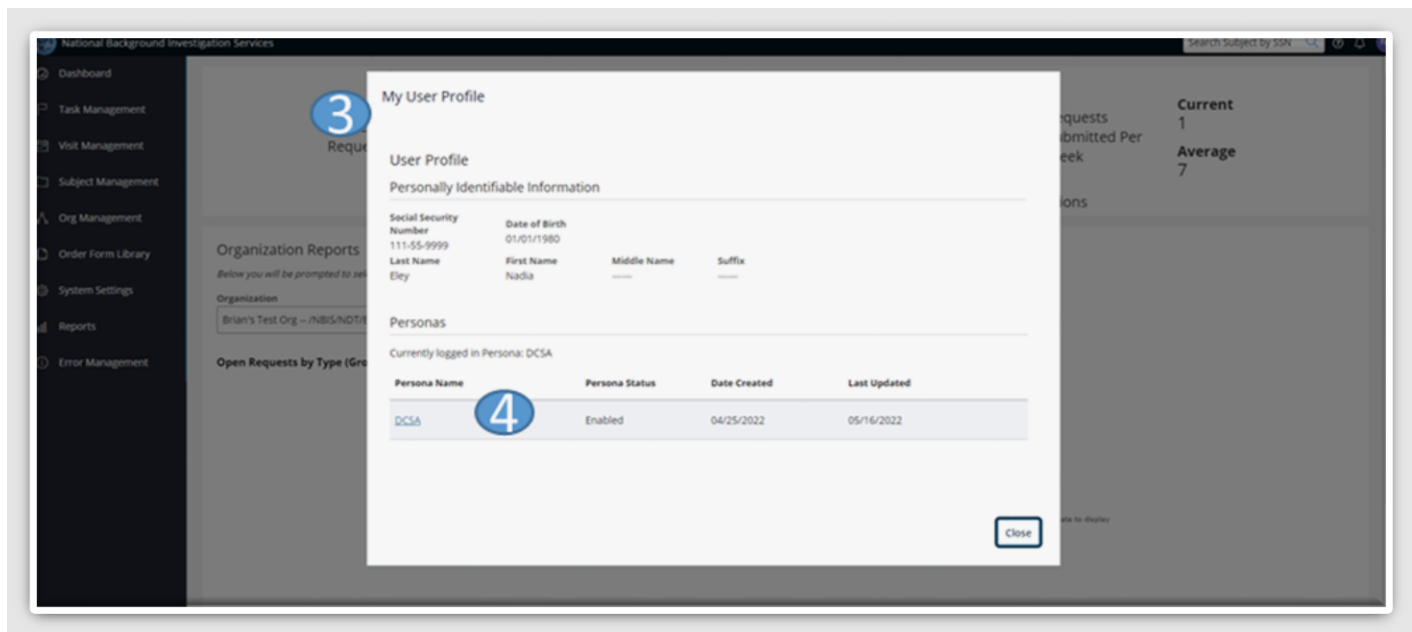
Hierarchy Details Teams

Organization Hierarchy

Actions

Name	Organization Type	Sub-Organizations	Users	Actions
> Cohort4-Sub-Org-Authorize ★	SSC, Review, Authorize	1	2	⋮
Cohort4-Sub-Org-Initiate ★	SSC, Review, Authorize	0	2	⋮
Cohort4-Sub-Org-Review ★	SSC, Review, Authorize	0	2	⋮
> Eley Advanced Technologies ★	SSC, Review, Authorize	3	0	⋮

Step 3-4



3

4

My User Profile

User Profile

Personally Identifiable Information

Social Security Number: 111-55-9999

Date of Birth: 01/01/1980

Last Name: Eley

First Name: Nadia

Middle Name: -----

Suffix: -----

Personas

Currently logged in Persona: DCSA

Persona Name	Persona Status	Date Created	Last Updated
DCSA	Enabled	04/25/2022	05/16/2022

Close

Organization Reports

Below you will be prompted to select a request type.

Organization: Brian's Test Org - rNBISNOTIF

Open Requests by Type (Geo)

Current: 1

Submitted Per Week: 7

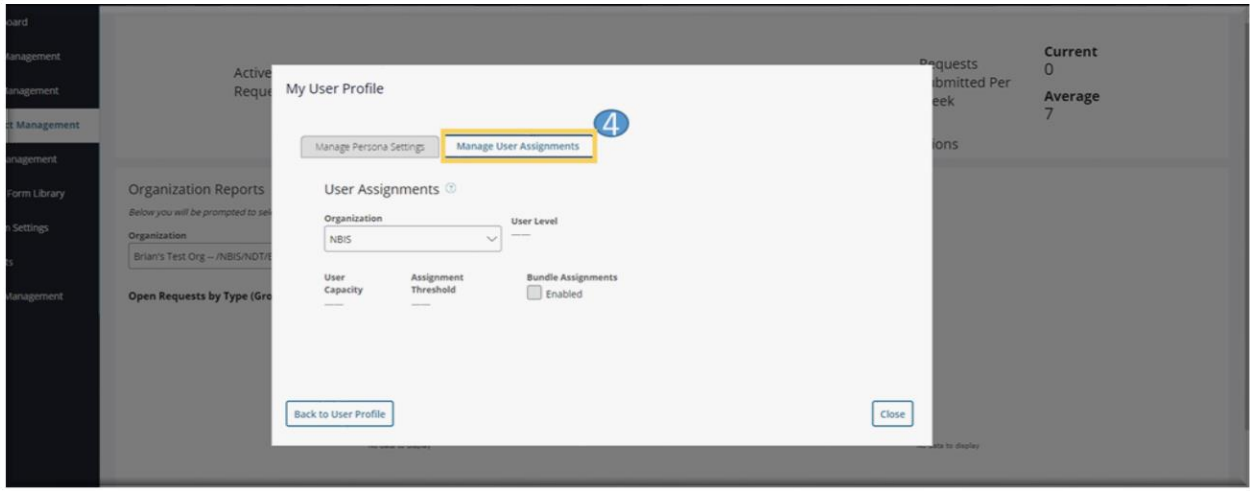
Average: 7



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Step 4 continued



My User Profile

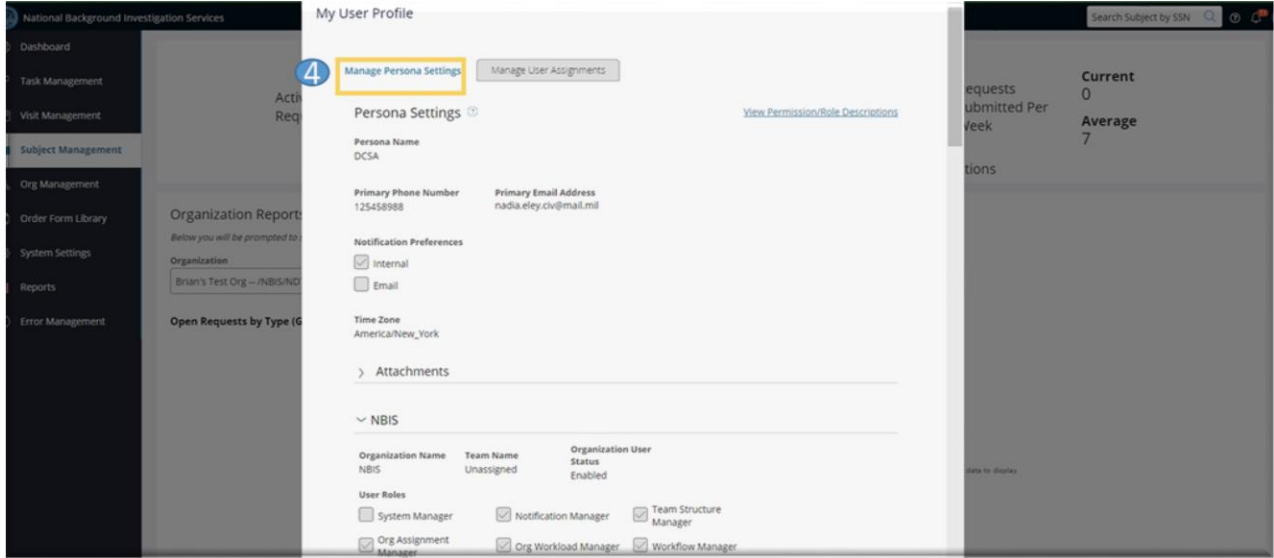
Manage Persona Settings **4** Manage User Assignments

User Assignments ⓘ

Organization: NBIS User Level: _____

User Capacity: _____ Assignment Threshold: _____ Bundle Assignments: ☒ Enabled

[Back to User Profile](#) [Close](#)



My User Profile

4 Manage Persona Settings Manage User Assignments

Persona Settings ⓘ [View Permission/Role Descriptions](#)

Persona Name: DCSA

Primary Phone Number: 125458988 Primary Email Address: nadia.eley.civ@mail.mil

Notification Preferences: ☒ Internal ☐ Email

Time Zone: America/New_York

> Attachments

~ NBIS

Organization Name	Team Name	Organization User Status
NBIS	Unassigned	Enabled

User Roles:

☐ System Manager ☒ Notification Manager ☒ Team Structure Manager

☒ Org Assignment Manager ☒ Org Workload Manager ☒ Workflow Manager



HOW TO VIEW NOTIFICATIONS

Purpose and Overview: Notification Managers have the capability to build a wide variety of notifications for an org. These notifications are then sent automatically by the system based on the parameters set up by the Notification Manager. Internal notifications must be enabled in user's profile to allow for them to appear in the notification drop-down. Please note that case related notifications may have the link disabled if the user does not have the correct roles/permissions to view the case.

Below is the 3-step process to view a Notification:

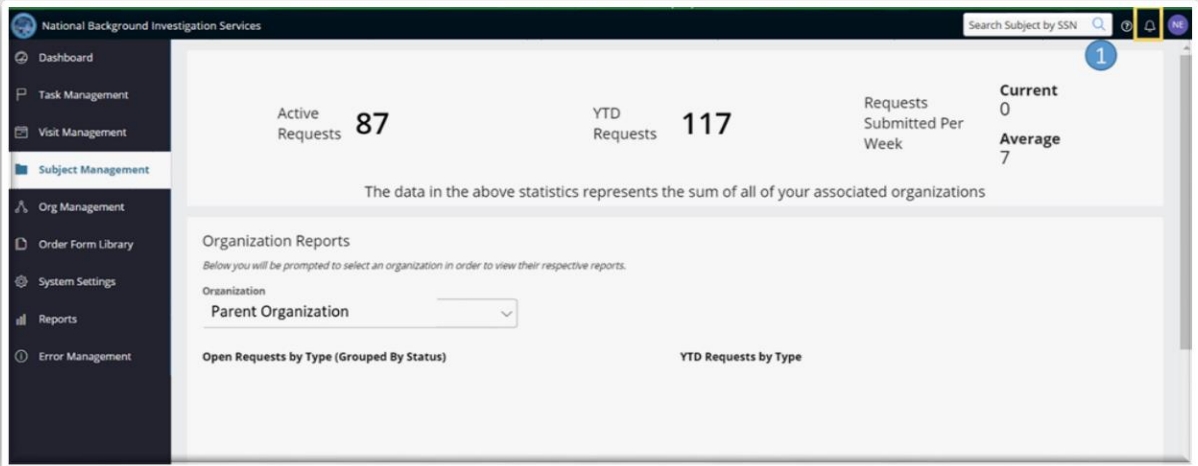
1. After initial log in, users can select the [bell notification icon](#) button in the upper right-hand portion of the screen next to their initial.
 - a. After users click on the notification icon, a drop-down menu will appear displaying a list of notifications sent to the user.
2. If a significant number of notifications are present, there will be an option to "Show More" which will display all notifications on a new page
3. If enabled, [click the link](#) below the notification to view the associated case request.



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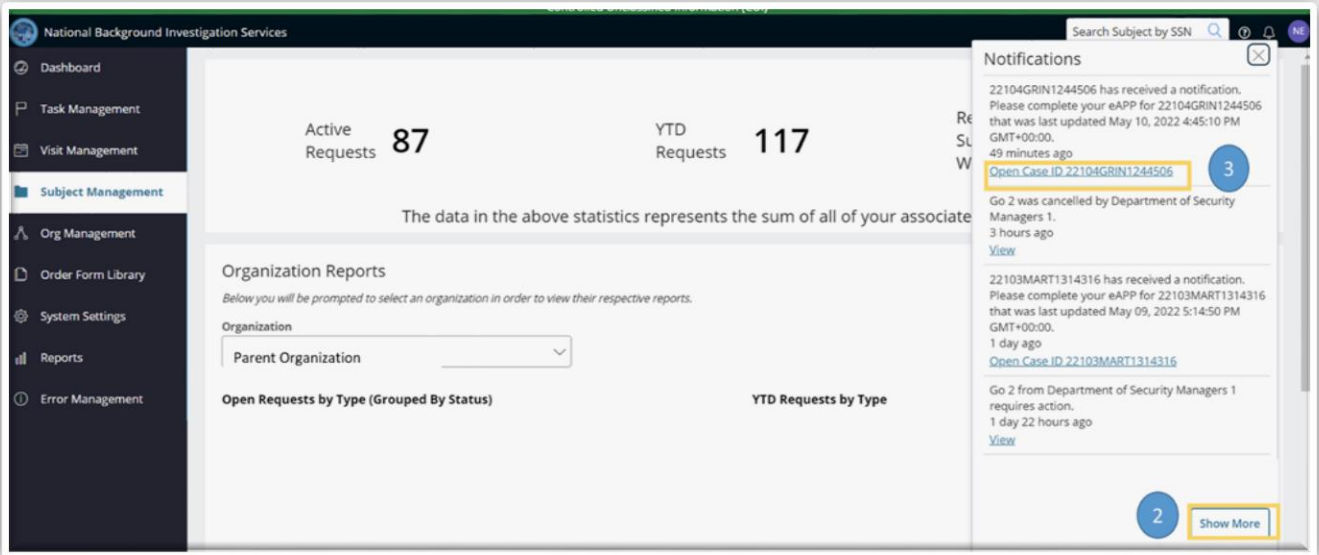
Step 1



The screenshot shows the NBIS dashboard with the following elements:

- Search Bar:** Search Subject by SSN
- Statistics:**
 - Active Requests: 87
 - YTD Requests: 117
 - Requests Submitted Per Week: Current 0, Average 7
- Message:** The data in the above statistics represents the sum of all of your associated organizations
- Organization Reports:** Below you will be prompted to select an organization in order to view their respective reports.
- Organization:** Parent Organization (dropdown menu)
- Open Requests by Type (Grouped By Status)**
- YTD Requests by Type**

Steps 2-3



The screenshot shows the NBIS dashboard with the following elements:

- Search Bar:** Search Subject by SSN
- Statistics:**
 - Active Requests: 87
 - YTD Requests: 117
- Message:** The data in the above statistics represents the sum of all of your associated organizations
- Organization Reports:** Below you will be prompted to select an organization in order to view their respective reports.
- Organization:** Parent Organization (dropdown menu)
- Open Requests by Type (Grouped By Status)**
- YTD Requests by Type**
- Notifications:**
 - 22104GRIN1244506 has received a notification. Please complete your eAPP for 22104GRIN1244506 that was last updated May 10, 2022 4:45:10 PM GMT+00:00. 49 minutes ago. [Open Case ID 22104GRIN1244506](#)
 - Go 2 was cancelled by Department of Security Managers 1. 3 hours ago. [View](#)
 - 22103MART1314316 has received a notification. Please complete your eAPP for 22103MART1314316 that was last updated May 09, 2022 5:14:50 PM GMT+00:00. 1 day ago. [Open Case ID 22103MART1314316](#)
 - Go 2 from Department of Security Managers 1 requires action. 1 day 22 hours ago. [View](#)
- Buttons:** 2, Show More

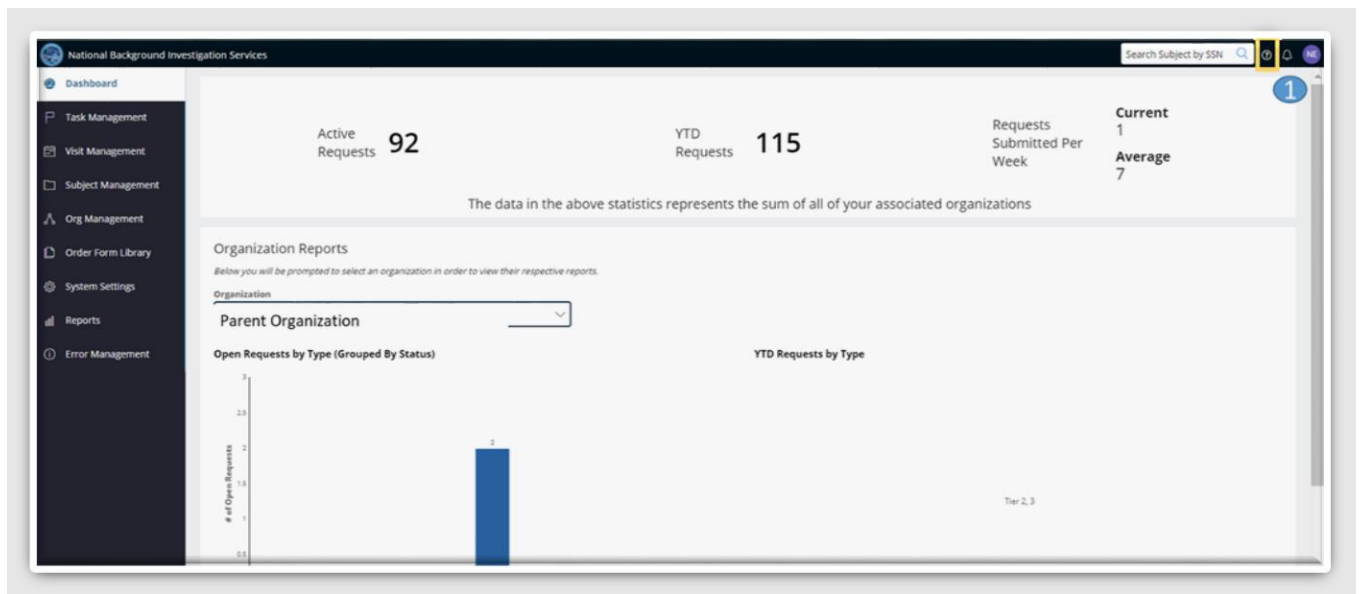


HOW TO ACCESS NBIS HELP

Purpose and Overview: The NBIS help icon is indicated by the circled question mark in the top right corner of the screen. All NBIS users have access to the help icon. Below is the 2-step process to access NBIS help.

1. After initial log in, users can select the **question mark icon** button in the upper right-hand portion of the screen next to their initials.
 - a. **Note:** Question mark/help icons are also available throughout NBIS pages to provide additional information on fields. Select the icon for assistance in identifying information needed to complete the field.
2. A pop-out will appear with a link to submit a ticket via the online ticket portal and a number to the Service Desk to access NBIS support by phone. The NBIS version number is also available if need to enable the Service Desk to assist with troubleshooting.
 - a. Users should be as detailed as possible when submitting a ticket to support issue identification and troubleshooting.

Step 1

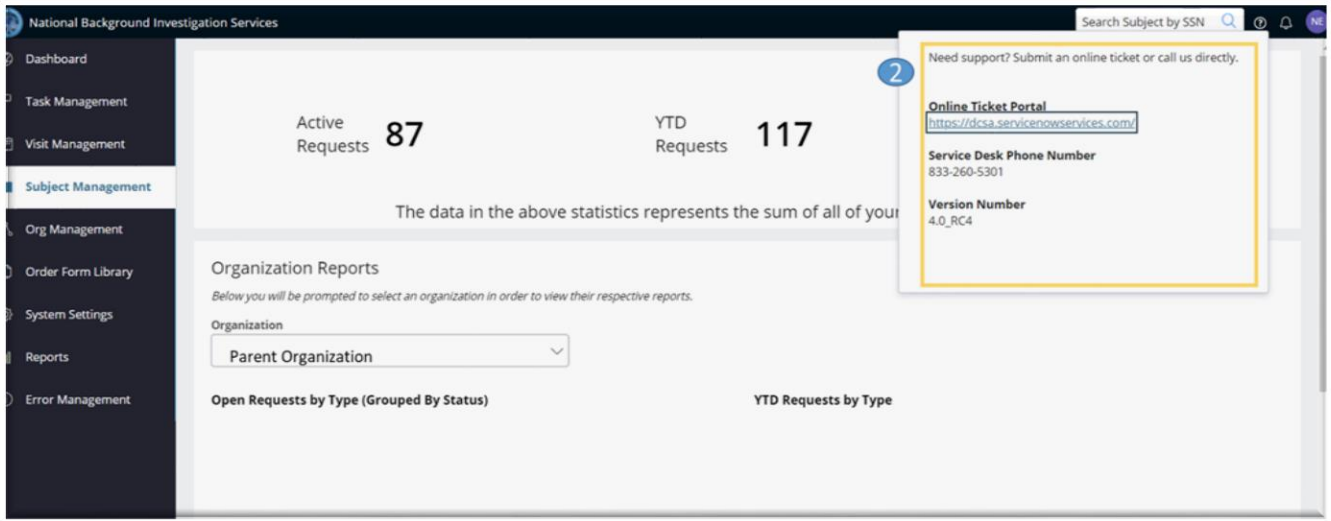




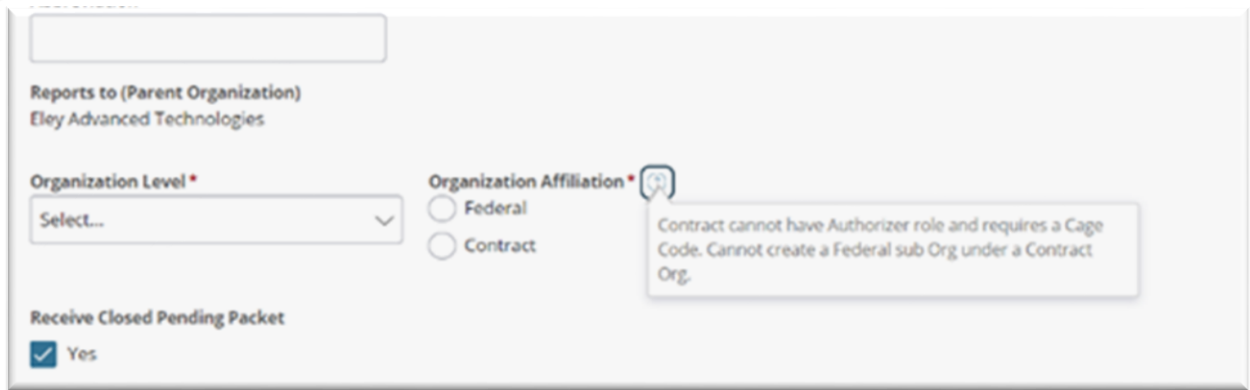
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Step 2



Example of Help Icon in NBIS field





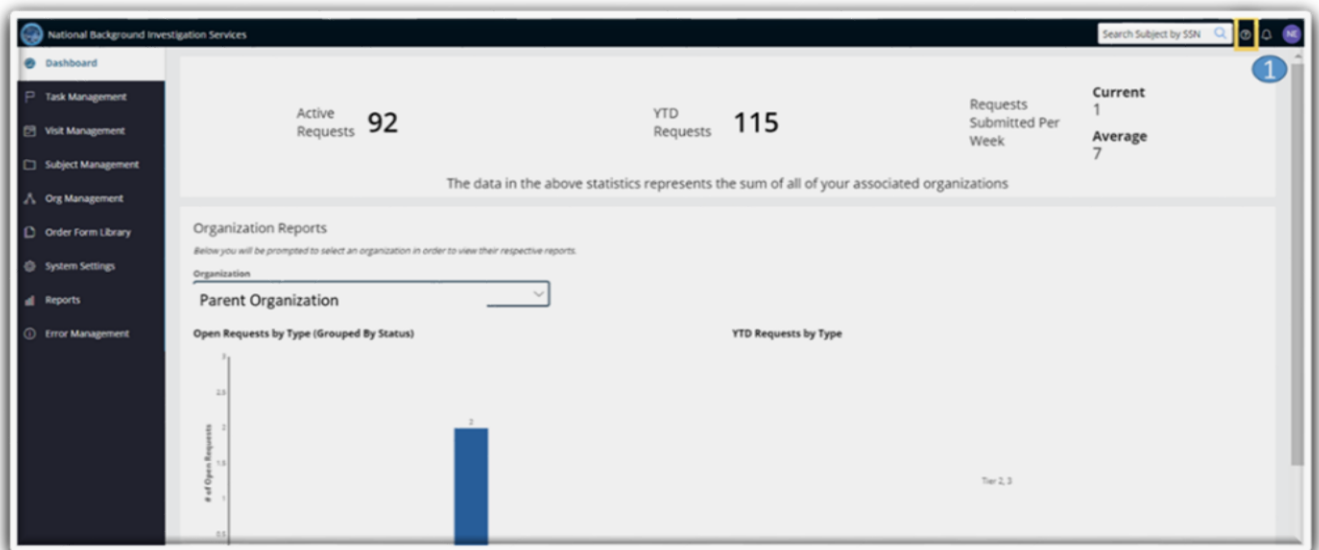
HOW TO UTILIZE GLOBAL SUBJECT SEARCH

Purpose and Overview: Users may choose to search for a subject by entering their SSN in the Global Search Bar. The Global Search Bar enables users with the Subject Manager, Authorizer, Reviewer, Initiator, Mass Initiator, Screener, Subject Viewer and Facility Security Officer (FSO) roles to access Subject Profiles. Creating a subject within NBIS requires the user to first search for a Subject using their SSN, which will be covered in further detail in the NBIS Consolidated Job Aid Volume 2.

Below is the 2-step process to locate an existing Subject using the Global Search Bar:

1. In the upper right-hand corner of the NBIS screen, type the Subject's SSN into the **Global Search Bar** and select the **magnifying glass** (or press Enter) to search for the Subject.
2. If a Subject exists, the system will direct the user to the subject's profile.
 - a. **Note:** If subject's profile does not exist, the user will be prompted to create one. More information can be found in the Subject Management section of the NBIS Consolidated Job Aid Volume 2.

Step 1

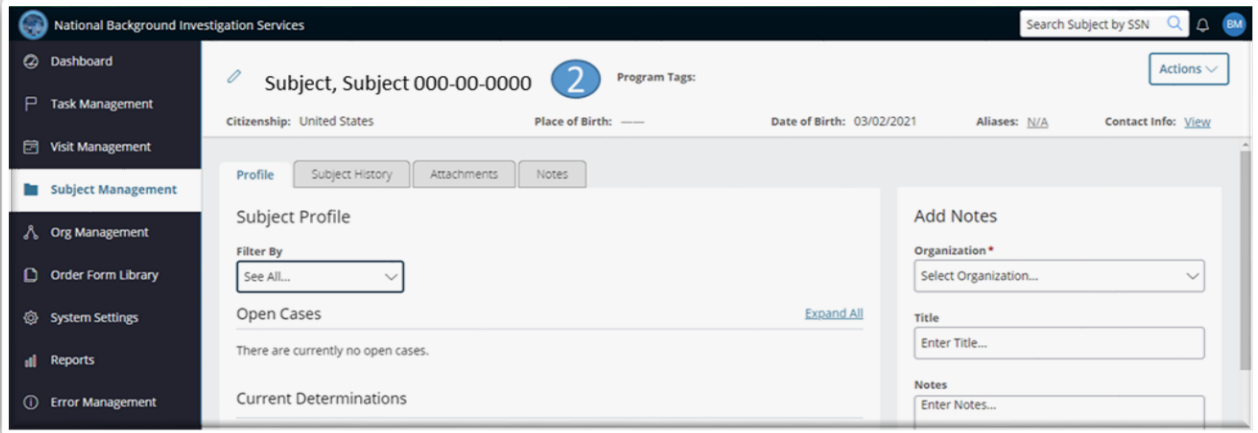




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

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Step 2



National Background Investigation Services

Search Subject by SSN

Subject, Subject 000-00-0000 2 Program Tags: Actions

Citizenship: United States Place of Birth: Date of Birth: 03/02/2021 Aliases: N/A Contact Info: View

Profile Subject History Attachments Notes

Subject Profile

Filter By See All...

Open Cases Expand All

There are currently no open cases.

Current Determinations

Add Notes

Organization * Select Organization...

Title Enter Title...

Notes Enter Notes...



NAVIGATION MENU

Purpose and Overview: The Navigation Menu provides quick access to NBIS pages. The options available to the user within the navigation menu vary based on their user role(s).

To access the navigation menu, users will either see the black navigation bar on the left-hand side of the NBIS screen or a small icon (a three lined column or hamburger icon) in the top-left corner of the NBIS screen that will expand into the navigation menu. The user's screen size &/or zoom setting will dictate how the navigation menu appears.

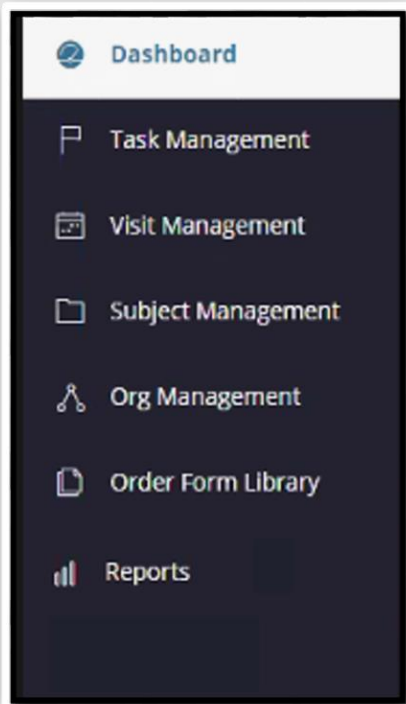
Click a selection from the navigation bar to view that page and/or perform actions from that page.

1. **Task Management** is where users can view the work assigned to them and their org(s), and view cases they have previously worked/taken action on. Workload Managers and the Task Reassignment user roles can also assign/reassign work to capable users within this page. Task Management is covered in more detail in the NBIS Consolidated Job Aid Volume 2.
2. **Visit Management** allows Subject Managers and Facility Security Offices (FSO)s to create visits and invite organizations to attend meetings and events. Visits can be created through the Visit Management tab and from the subject profile. Only Subject Managers and FSOs can create, request, and approve visits. The Subject Viewer role can view the visits on the Visit Management tab and on the subject profile. Visit Management is covered in more detail in the Investigation Management Online Agency User Guide.
3. **Subject Management** provides one central page within NIBS to locate and manage Subjects. This component of NBIS is designed to help maintain relationships between Subjects and organizations, and then to ultimately use this relationship to manage Subjects' access and visits. Subject Management is covered in more detail in the NBIS Consolidated Job Aid Volume 2.
4. **Organization (Org) Management** refers to an organization hierarchy structure and its alignment of user roles throughout its organizational levels. Org Management is the creation and sustainment of an organization's hierarchy to ensure user roles and system accesses are properly aligned and monitored. Org Management will appear for users with the Org Manager role.
5. **Order Form Library** is the location that organization's Order Form Templates are housed. Order Form Templates are created to be utilized during the Review & Authorization phases and pre-populate case details such as position details, optional coverage, and financial details to prevent the need for manual input.
6. **Reports** are available for Org Managers, User Managers, Subject Managers, and Org Workload Managers to pull reports for their associated organizations. Current reporting options include active case report, adjudication status count by org, user list, user activity, and case ingest, among others.



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Zoomed view of the Navigation Menu without Dashboard



ORGANIZATION MANAGEMENT

User Role Required: Org Manager. The Org Manager is responsible for building and managing the org's structure and details.

Purpose and Overview: Organization Management is a **mandatory** configuration. Development of the organization's hierarchy is a required step to ensuring cases are properly routed in NBIS and that orgs and sub-orgs have the roles and access necessary to perform its personnel vetting functions.

HOW TO VIEW ORGANIZATION HIERARCHY AND DETAILS

Purpose and Overview: The Org Management tab allows Org Managers to view, search, or navigate to different organizations and/or sub-organizations within a hierarchy.

Below is the 5-step process for how to view hierarchies and organization details:

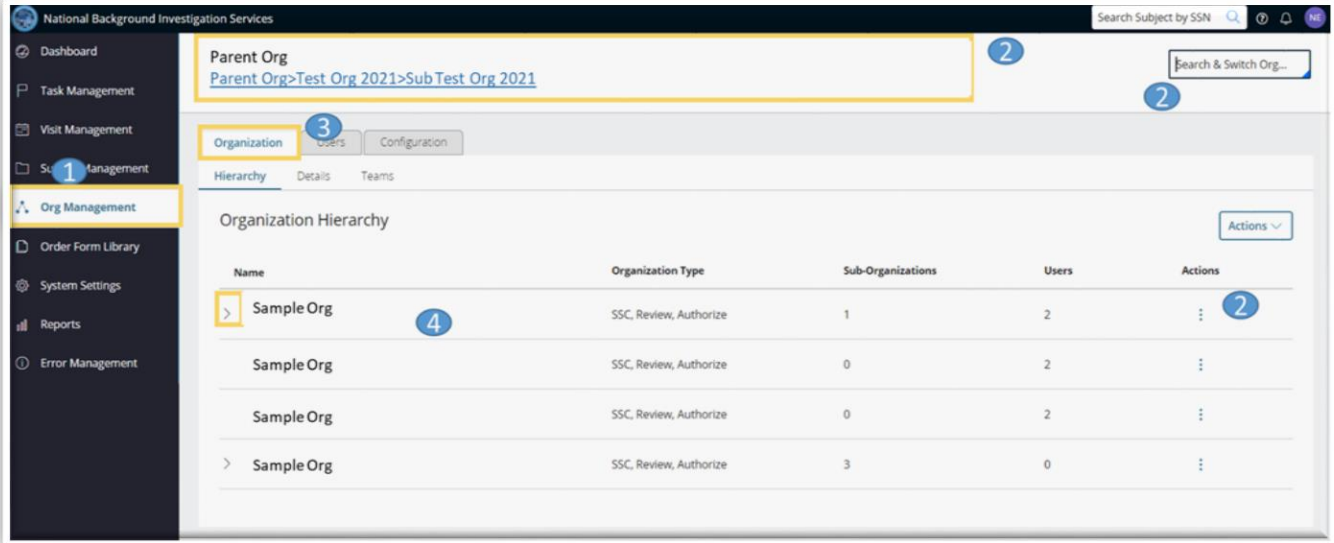
1. Navigate to **Org Management** on the left-hand side of the navigation panel.
2. Once within Org Management, there are two ways to navigate to the org.
 - a. **Search An Organization:** Navigate to the **Search and Switch Org** field in the top-right corner. From the Search & Switch Org field, **enter an organization's name, abbreviation, or org code** to find and select a different organization within your organization's hierarchy.
 - b. **Switch Organization Context:** In the Actions column, **select the ellipsis** to display the options for the sub-org users wish to view. Select **Switch Organization Context** to view the sub-org's details, users, and hierarchy.
 - c. The organization title and breadcrumbs at the top of the page will tell users which organization's attributes they are viewing.
 - d. The Hierarchy tab displays the sub-orgs in the current organization's hierarchy.
 - e. The teams tab may not appear for all users and may not be applicable to the org. This tab populates based on the org type, functions, & roles. Teams are applicable to adjudication only. More information can be found in the Investigation Management Online Service Provider's Guide.
4. **Select the arrow (>)**, if available, to view an expansion of the sub-org's hierarchy. If no arrow is visible, there are no sub-orgs within the org.
5. **Navigate to the Details tab** to view the current organization's details. This includes an overview of the organization; the designated organization types, functions, and roles; and additional information (i.e., CV Settings, Legacy Systems, Location, Mailing Address, and Point of Contact).



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Steps 1-4



National Background Investigation Services

Search Subject by SSN

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Search & Switch Org...

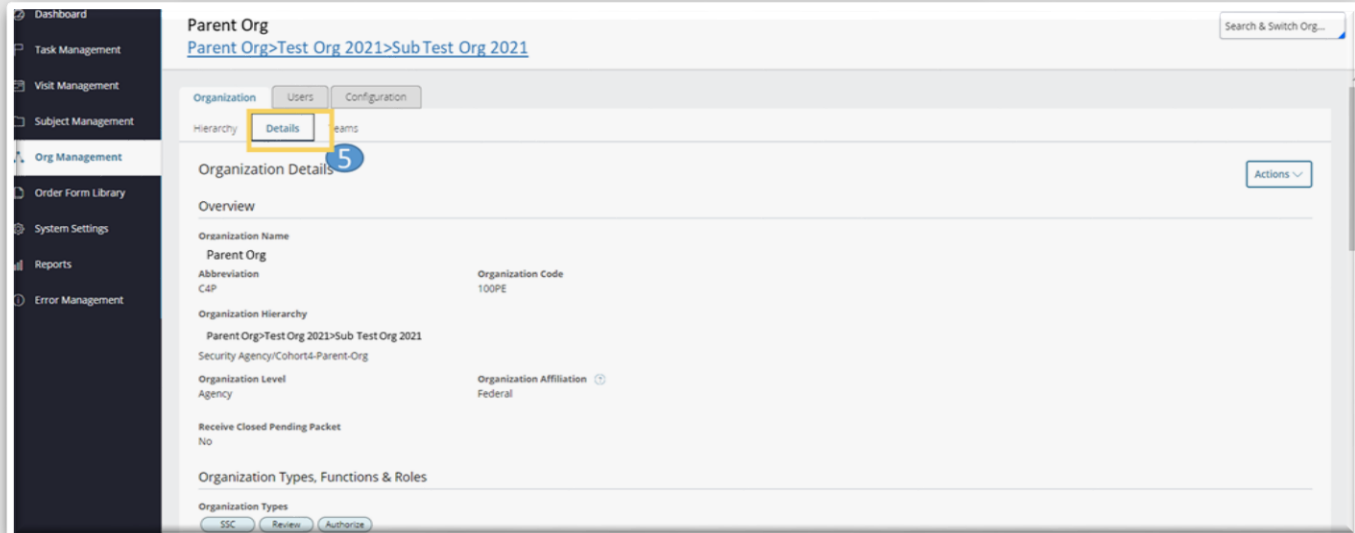
Organization Users Configuration

Hierarchy Details Teams

Organization Hierarchy

Name	Organization Type	Sub-Organizations	Users	Actions
> Sample Org	SSC, Review, Authorize	1	2	⋮
Sample Org	SSC, Review, Authorize	0	2	⋮
Sample Org	SSC, Review, Authorize	0	2	⋮
> Sample Org	SSC, Review, Authorize	3	0	⋮

Step 5



National Background Investigation Services

Search Subject by SSN

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Search & Switch Org...

Organization Users Configuration

Hierarchy Details Teams

Organization Details

Overview

Organization Name
Parent Org

Abbreviation
C4P

Organization Code
100PE

Organization Hierarchy
Parent Org>Test Org 2021>Sub Test Org 2021
Security Agency/Cohort4-Parent-Org

Organization Level
Agency

Organization Affiliation
Federal

Receive Closed Pending Packet
No

Organization Types, Functions & Roles

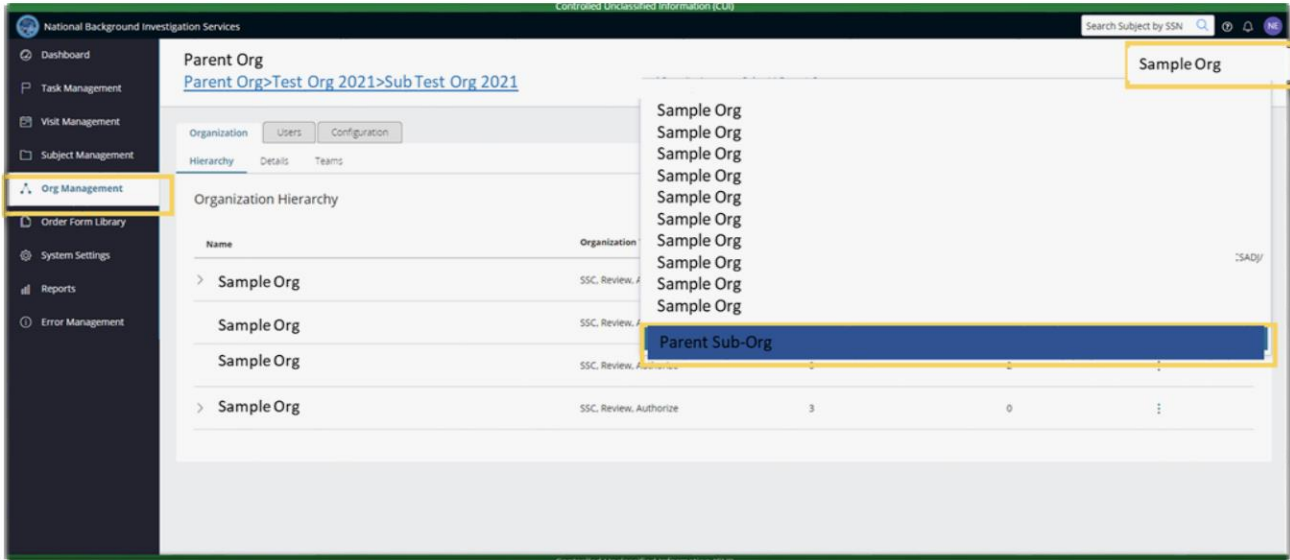
Organization Types
SSC Review Authorize



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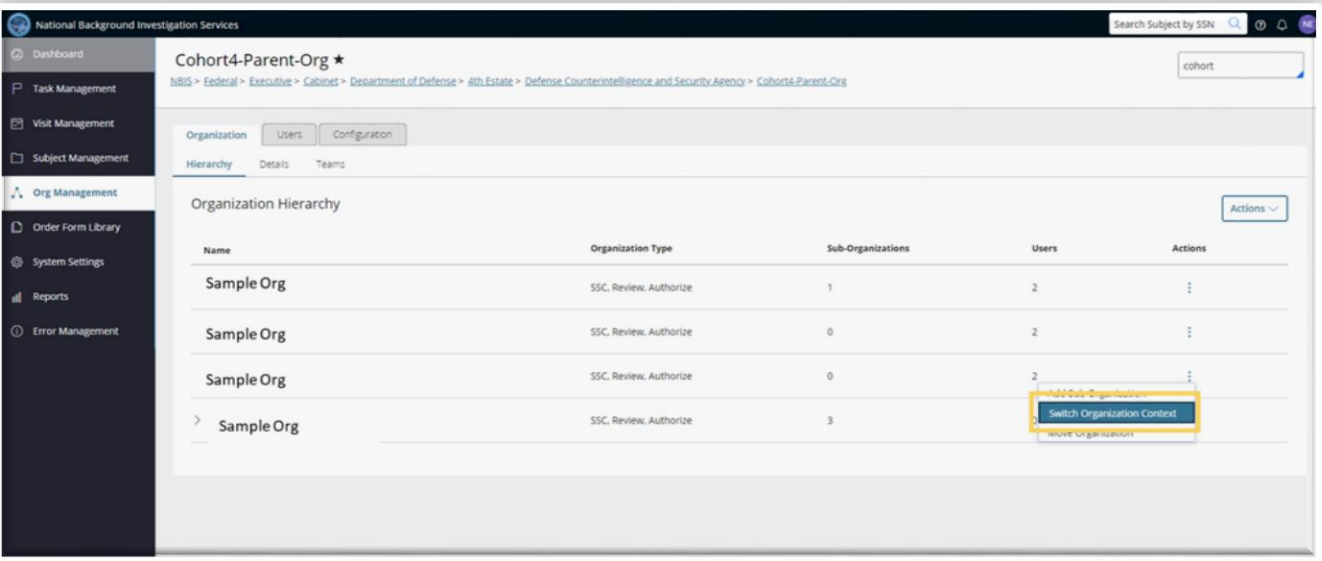
JOB AID

Search an Organization



The screenshot shows the NBIS Job Aid interface. The left sidebar contains a menu with 'Org Management' highlighted. The main content area displays the 'Parent Org' hierarchy: 'Parent Org > Test Org 2021 > Sub Test Org 2021'. A dropdown menu is open, showing a list of organizations including 'Sample Org' and 'Parent Sub-Org'.

Switch Organization Context



The screenshot shows the NBIS Job Aid interface. The left sidebar contains a menu with 'Org Management' highlighted. The main content area displays the 'Cohort4-Parent-Org' hierarchy: 'NBIS > Federal > Executive > Cabinet > Department of Defense > 4th Estate > Defense Counterintelligence and Security Agency > Cohort4-Parent-Org'. A dropdown menu is open, showing a list of organizations including 'Sample Org' and 'Parent Sub-Org'. A 'Switch Organization Context' button is highlighted.



HOW TO ADD ORGANIZATIONS

Purpose and Overview: The hierarchy is the technical reporting structure for an organization and its sub-organizations arranged in a network tree with varying levels to support its functions. The creation of the organization's hierarchy through org management establishes the foundation for supporting the organization's personnel vetting functions and ensuring appropriate visibility and management of personnel (system users).

The first step in building a hierarchy is creating the parent org. The parent org is the highest point of responsibility in the reporting structure. Additional orgs (sub-orgs) are built beneath the parent org to designate sub-components &/or offices responsible for various I-R-A duties, Adjudication, or other office with NBIS related duties. The parent org will be built on the agency's behalf by the NBIS Deployment Onboarding Team.

Below is the 10-step process for how to add an org:

1. Navigate to **Org Management** on the left-hand side of the navigation panel and use the search and switch field in the top-right corner to **enter an organization's name, abbreviation, or org code** to find and select the designated org (if needed).
2. In the **Details** tab, select the Actions drop-down menu and choose **Add Organization**.
3. The system will move you to the **Organization Details** tab to enter the required details (marked by a red asterisk): Organization Name, Abbreviation, Org Level, Organization Affiliation.
 - a. The abbreviation & org affiliation cannot be changed once the org has been built.
4. Indicate whether the org should receive closed pending packets. The checkbox must be selected to indicate "Yes" if agency receives closed pending packets. Do not check if agency opts out of receiving closed pending packets.
 - a. This selection is made by the agency, by SOI, then relayed to the ISP for proper case closing and routing
 - b. The current selection must match the agency's current agreement with the ISP
5. Choose the **Org Type(s)** from the drop-down menu.
 - a. This will auto-populate some of the corresponding Org Functions and Org Roles. Users may choose to "x" out of these to remove any unnecessary Org Types, Org Functions, and Org Roles. Users may also add applicable Org Types, Org Functions, and Org Roles as necessary.
 - b. **Note:** To view the Role Descriptions/Permissions table, click on the bottom link titled "**View Permissions/Role Descriptions**" and review the latest role descriptions before saving.
6. Users must enter the **Legacy Systems (SON and SOI)** information to ensure the data is available for selection during the I-R-A process and if/when building Order Form Templates.
 - a. Submitting Office Number (SON): Four digit agency identifier which permits DCSA to return investigative reports to agency approved addresses. SON is required for each personnel office that submits investigation requests and to make case status requests.

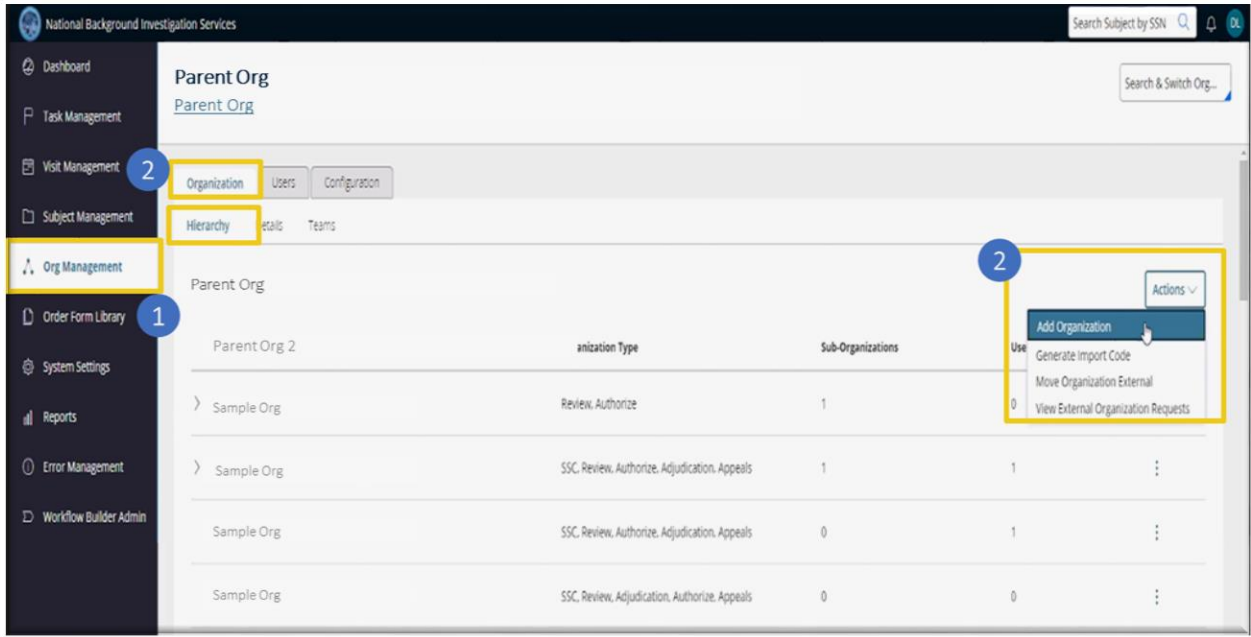


DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

- b. Security Office Identifier (SOI): Four character agency identifier used to identify the appropriate agency official who will receive case results, data, or other information. SOI is required for each personnel office that submits investigation requests.
7. Enter **Organization Location** and **Mailing Address**. These are required and marked by a red asterisk. The mailing address can be marked as the same as the Organization Location.
8. Once information is complete, click **Save**.
9. A green success banner will appear at the top stating the newly created Org has been added. The org that was created will now appear in the hierarchy.
10. Follow Steps 1 – 9 to create additional orgs and sub-orgs with the organization structure.
 - a. **Note:** Users are not automatically added as users to an org they create. Users must be added to an org by the User Manager. For example, if the creator of the org requires access to the org in any capacity (e.g., as an Org Manager, User Manager, Workflow Manager, etc.), the user must request a User Manager within their hierarchy add them to the sub-org(s) they created with the appropriate role(s) to continue with configurations. User profiles & roles will be further detailed in the [User Management](#) section of this job aid.

Steps 1-2



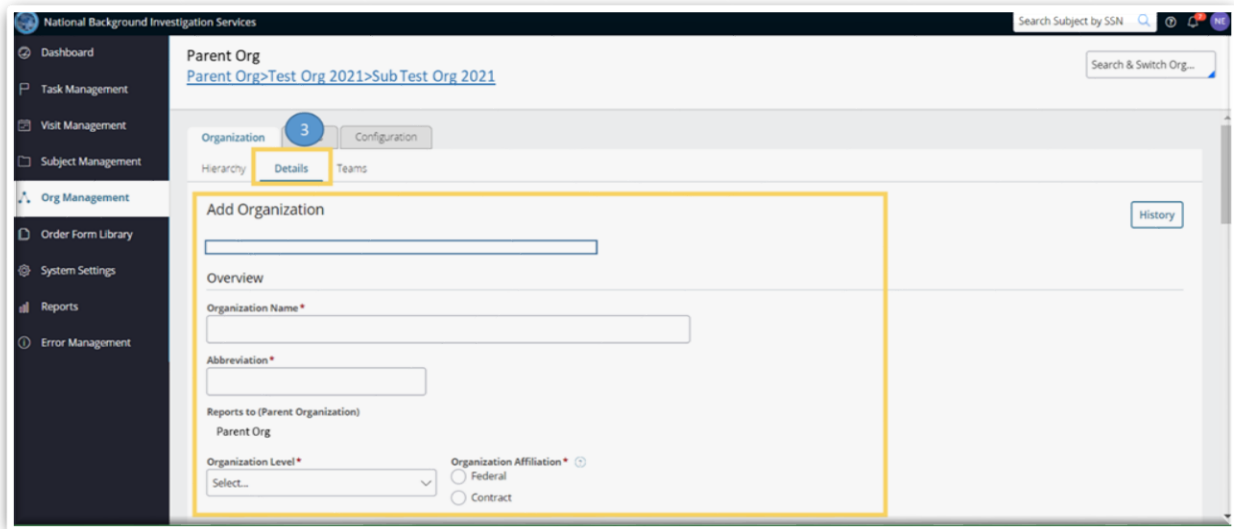
Parent Org	Organization Type	Sub-Organizations
Parent Org 2	Review, Authorize	1
> Sample Org	SSC, Review, Authorize, Adjudication, Appeals	1
> Sample Org	SSC, Review, Authorize, Adjudication, Appeals	1
Sample Org	SSC, Review, Authorize, Adjudication, Appeals	0
Sample Org	SSC, Review, Adjudication, Authorize, Appeals	0



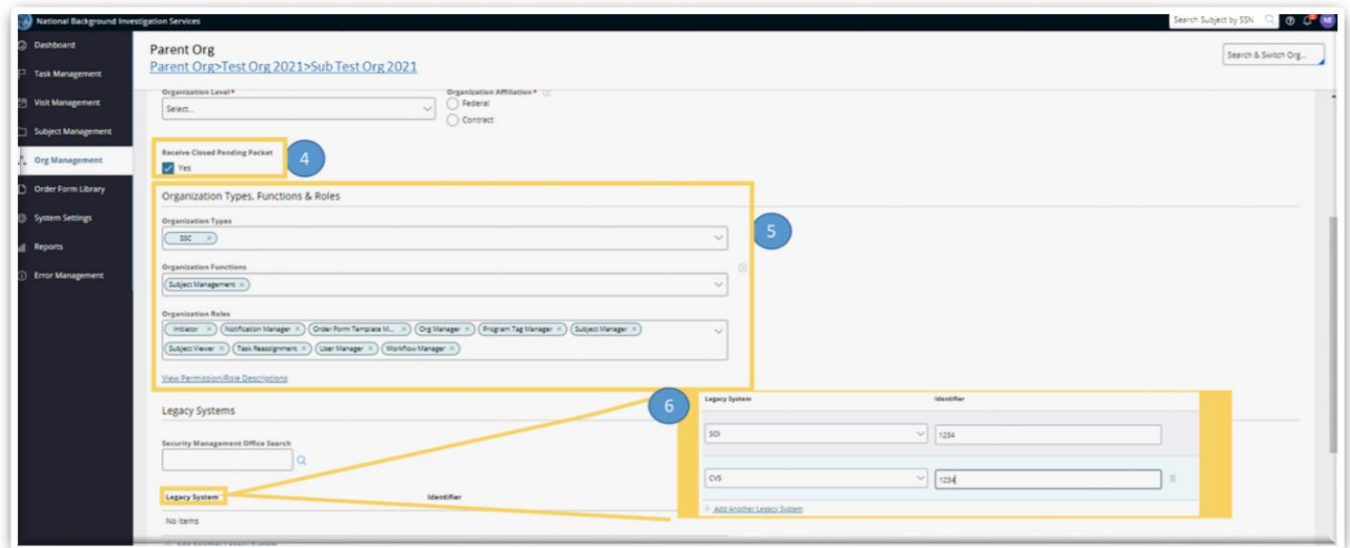
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 3



Steps 4-6

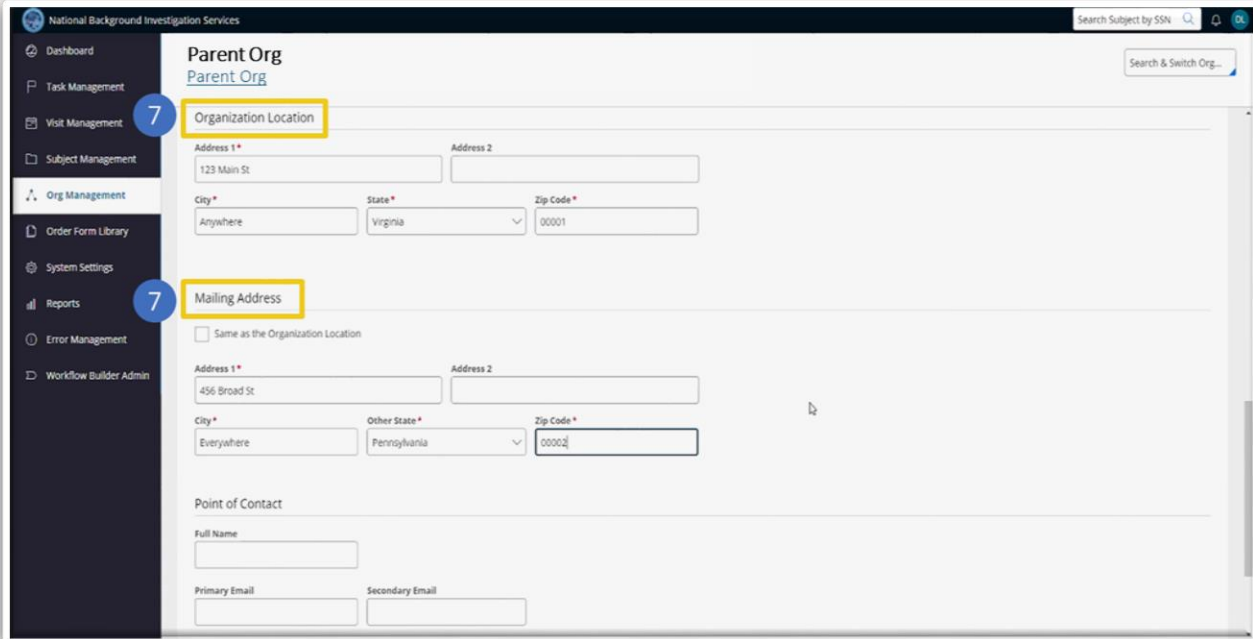




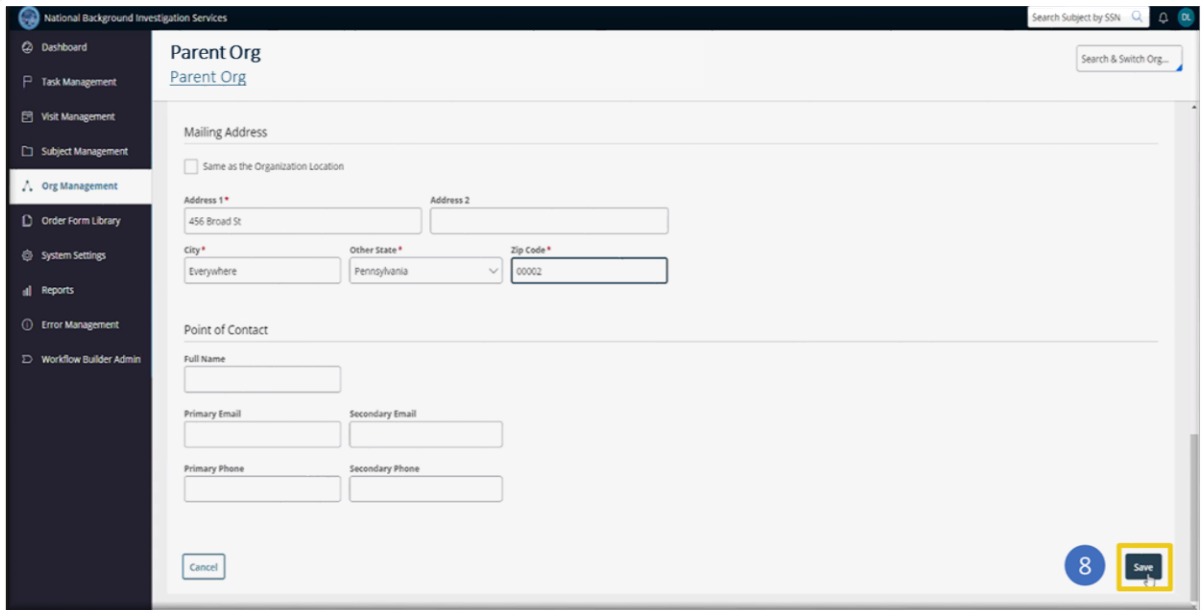
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 7



Step 8

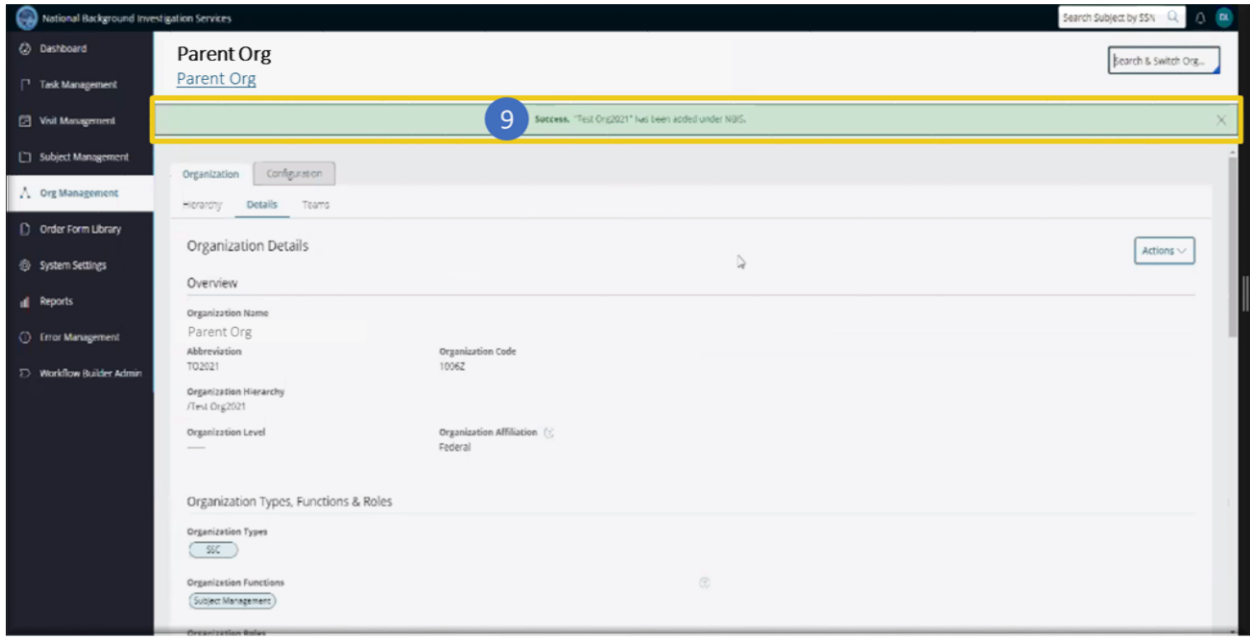




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 9



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

9 Success: "Test Org2021" has been added under NBIS.

Organization Configuration

Hierarchy Details Teams

Organization Details

Overview

Organization Name: Parent Org

Abbreviation: TO2021

Organization Code: 1006Z

Organization Hierarchy: /Intl.Org2021

Organization Level: ---

Organization Affiliation: Federal

Organization Types, Functions & Roles

Organization Types: SSC

Organization Functions: Subject Management

Order Form Library

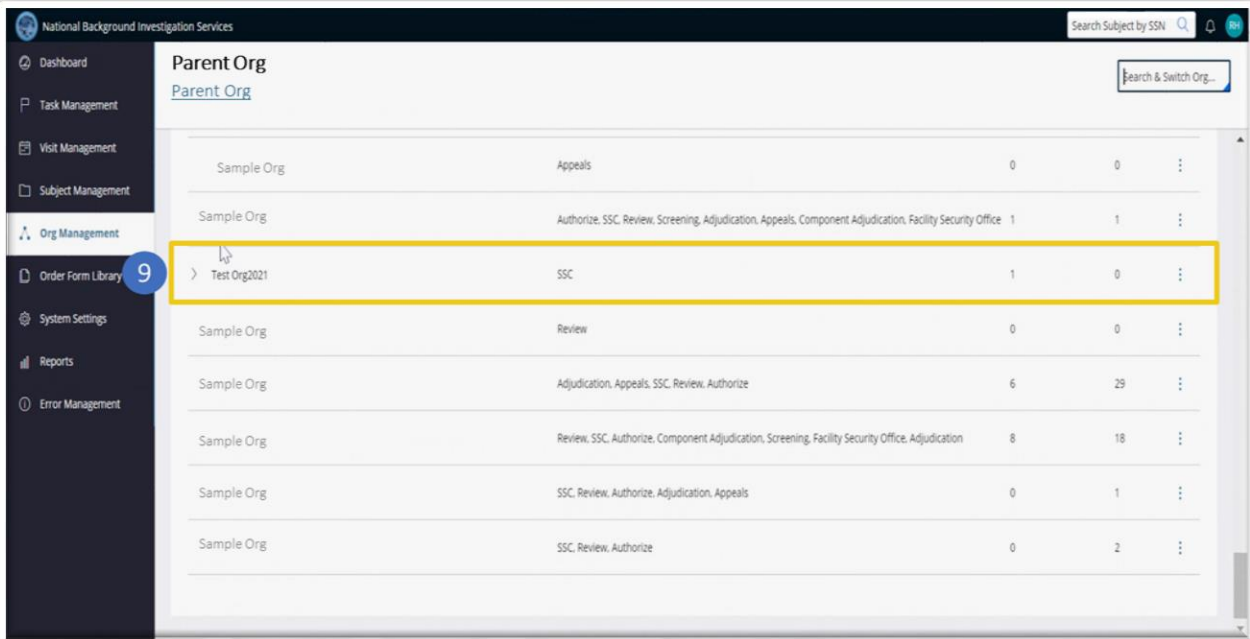
System Settings

Reports

Error Management

Workflow Builder Admin

Step 9 (Continued)



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

9

Organization Name	Organization Code	Organization Level	Organization Affiliation	Organization Functions
Sample Org	Appeals	0	0	⋮
Sample Org	Authorize, SSC, Review, Screening, Adjudication, Appeals, Component Adjudication, Facility Security Office	1	1	⋮
> Test Org2021	SSC	1	0	⋮
Sample Org	Review	0	0	⋮
Sample Org	Adjudication, Appeals, SSC, Review, Authorize	6	29	⋮
Sample Org	Review, SSC, Authorize, Component Adjudication, Screening, Facility Security Office, Adjudication	8	18	⋮
Sample Org	SSC, Review, Authorize, Adjudication, Appeals	0	1	⋮
Sample Org	SSC, Review, Authorize	0	2	⋮

Order Form Library

System Settings

Reports

Error Management



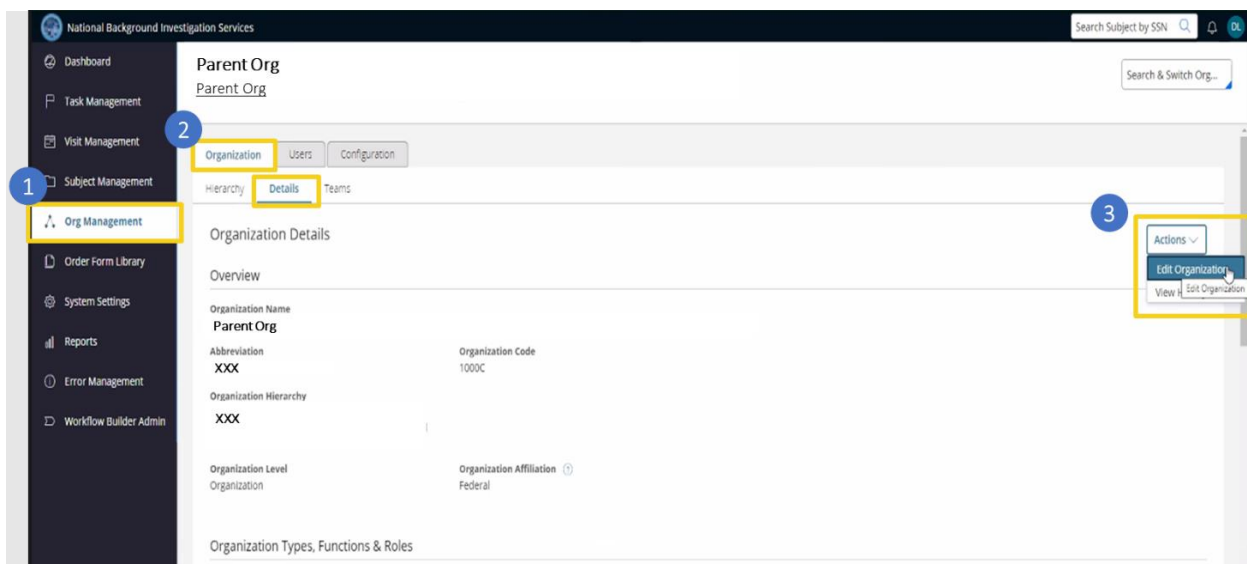
HOW TO EDIT ORGANIZATION DETAILS

Purpose and Overview: After navigating to a hierarchy to view the parent organization and its sub-orgs, users with the Org Manager role can edit their parent org/sub-org(s) if needed. Orgs may need to be edited to correct an address, add new user roles, add/update the POC, or input legacy data.

Below is the 4-step process for how to edit an org:

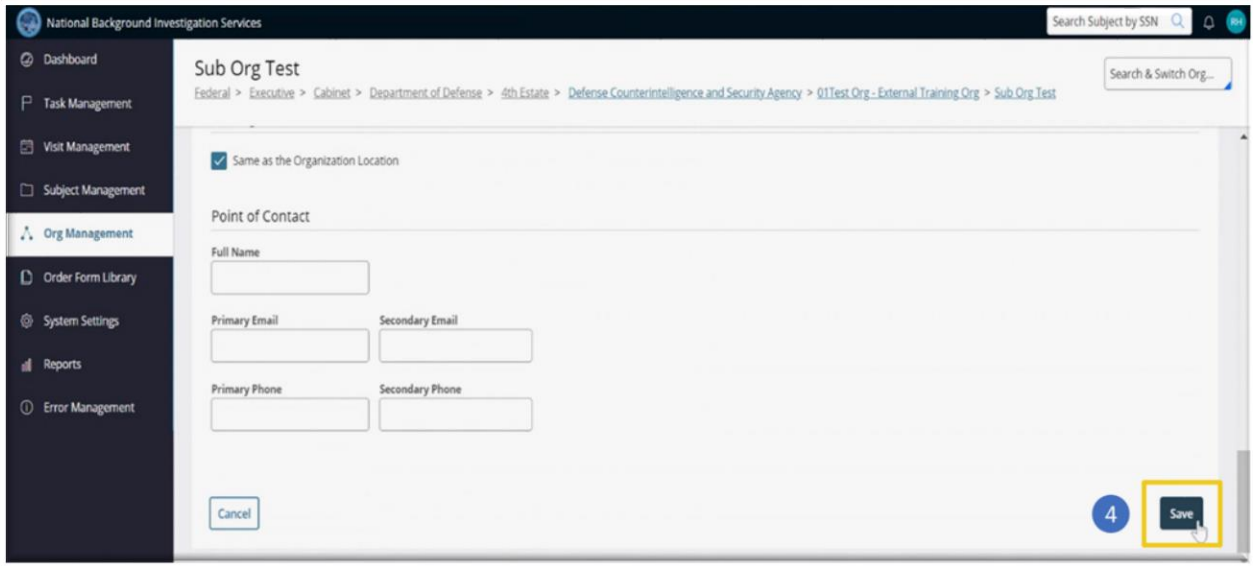
1. Navigate to **Org Management** in the left-hand panel and switch to the designated org (if needed).
 2. Select the Organization tab, then the **Details** tab beneath it.
 3. Under the Details tab, select **Edit Org** from the Actions drop-down menu.
 4. Edit any information in the fields as needed and click **Save**.
- a. **Note:** The abbreviation & affiliation cannot be edited after the org has been built. The Organization Level field is editable.

Steps 1-3





Step 4



HOW TO DELETE AN ORGANIZATION

Purpose and Overview: Users with the Org Manager role can delete an organization. Users can only delete an organization once all users, workflows, teams, and sub-orgs are removed from the organization. The Delete Org option from the Actions drop-down will only appear once all conditions have been met.

Below is the 4-step process for how to delete an org:

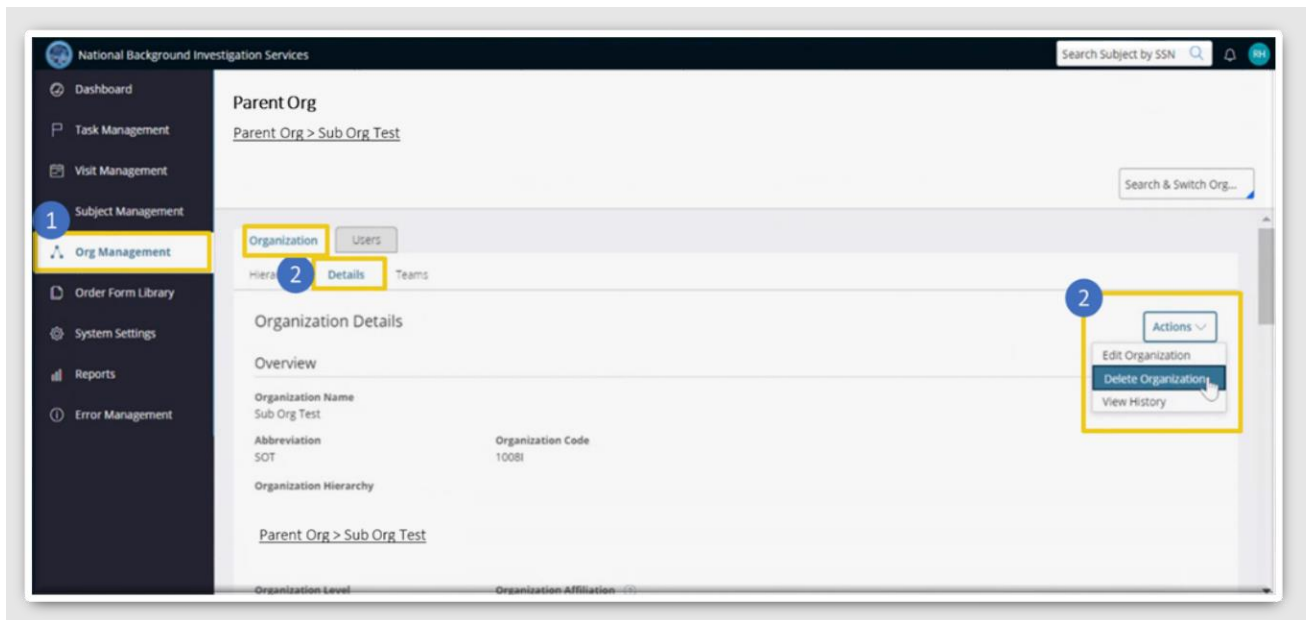
1. Navigate to **Org Management** on the left-hand side and switch to the designated Org (if needed).
2. Select the **Details** tab.
3. From the Actions drop-down, select **Delete Org**.
3. A confirmation screen will pop-up to confirm the deletion of the organization.
4. Select **Confirm** to delete the organization.



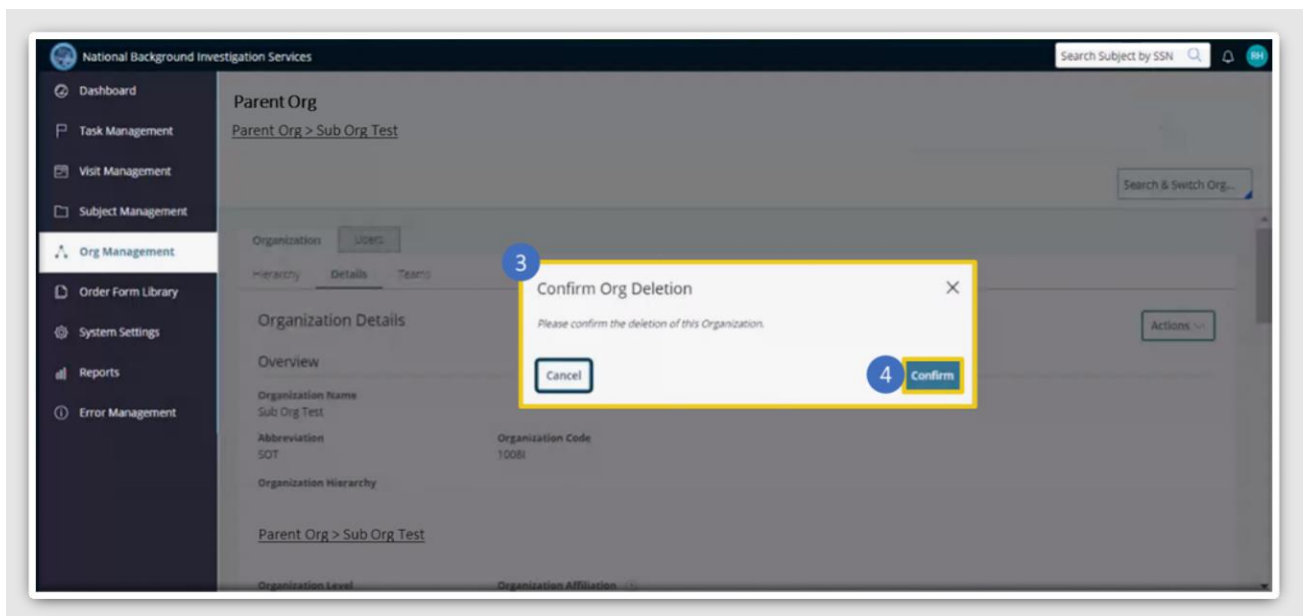
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1-2



Steps 3-4





HOW TO MOVE AN ORGANIZATION (INTERNAL MIGRATION)

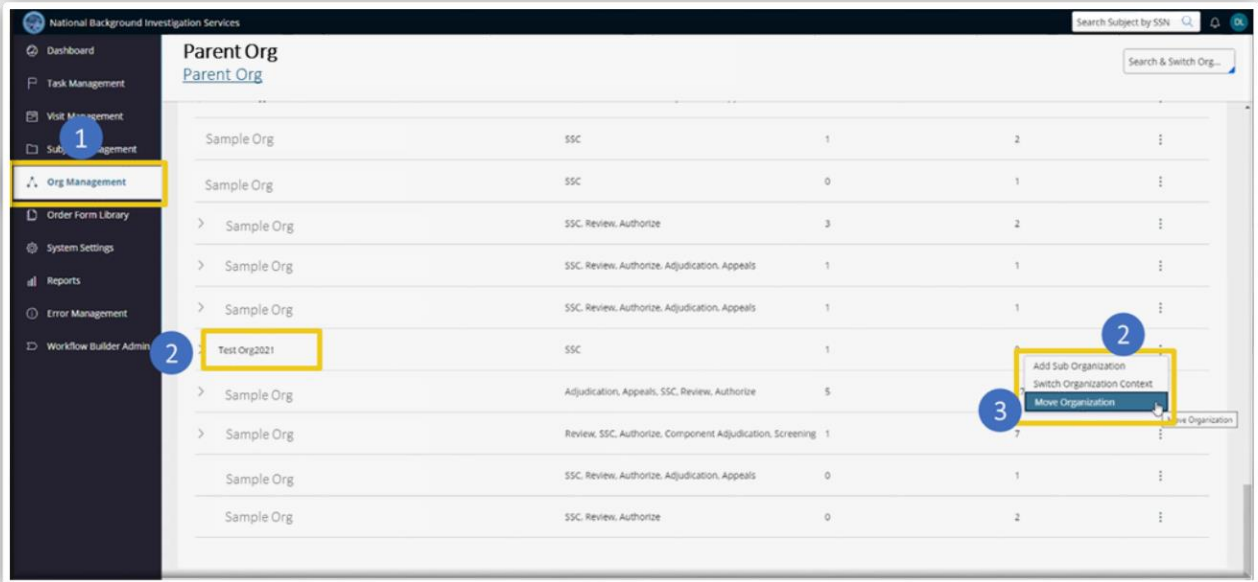
Purpose and Overview: Users with the Org Manager role can move sub-orgs within a hierarchy, which is known as an internal migration. Internal migration may be used to correct or move sub-orgs to maintain accuracy of the hierarchy structure.

If the moving organization has certain roles that the receiving organization does not have, these roles will be automatically dropped during the migration. In some cases, this means the sub-org will lose roles. In others, they will have the option to add additional roles that are now available under their new parent org. Additionally, an org cannot be migrated if there are any cases inflight within that org.

Below is the 4-step process for how to move an org:

1. Navigate to **Org Management** on the left-hand side of the navigation panel and switch to the designated organization to move.
2. Under the Actions column for the specific organization, select the ellipse icon under the Actions column, then select **Move Organization**.
3. Choose the receiving org and select **Move Here**. The confirmation page displays a preview of the new hierarchy to confirm the organization migration location, the impacted roles, and the number of users associated with these impacted roles.
4. Check the box to proceed with the change and select **Confirm** to finalize the migration.

Steps 1-3



The screenshot displays the NBIS Org Management interface. On the left, a navigation panel lists various options, with 'Org Management' highlighted and marked with a blue circle '1'. The main area shows a table of organizations under a 'Parent Org' header. The table has columns for organization name, role, and actions. The organization 'Test Org2021' is highlighted with a yellow box and marked with a blue circle '2'. To the right of this organization, a dropdown menu is open, showing options: 'Add Sub Organization', 'Switch Organization Context', and 'Move Organization'. The 'Move Organization' option is highlighted with a yellow box and marked with a blue circle '3'.

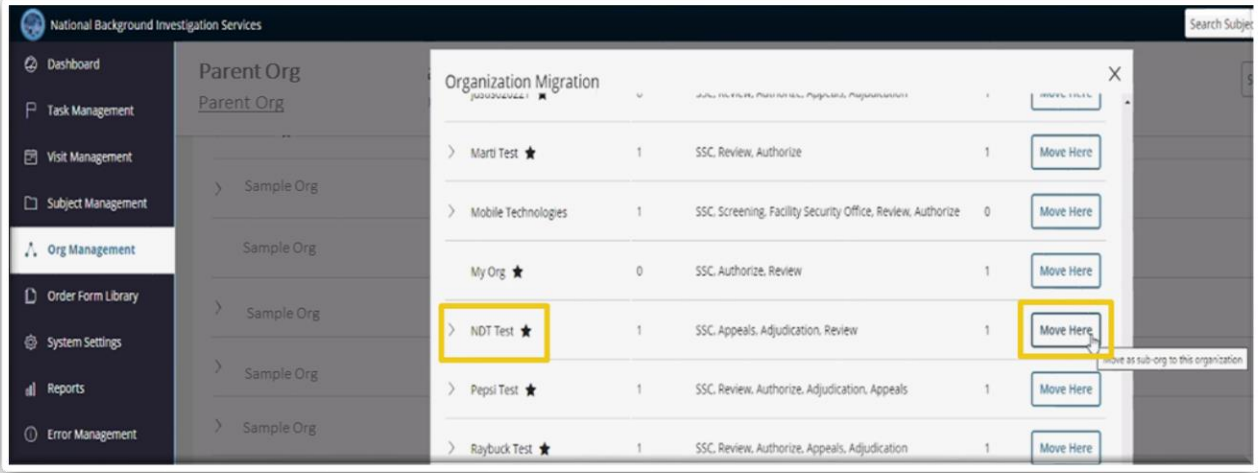
Organization	Role	Actions
Sample Org	SSC	1 2
Sample Org	SSC	0 1
> Sample Org	SSC, Review, Authorize	3 2
> Sample Org	SSC, Review, Authorize, Adjudication, Appeals	1 1
> Sample Org	SSC, Review, Authorize, Adjudication, Appeals	1 1
Test Org2021	SSC	1
> Sample Org	Adjudication, Appeals, SSC, Review, Authorize	5
> Sample Org	Review, SSC, Authorize, Component Adjudication, Screening	1
Sample Org	SSC, Review, Authorize, Adjudication, Appeals	0 1
Sample Org	SSC, Review, Authorize	0 2



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

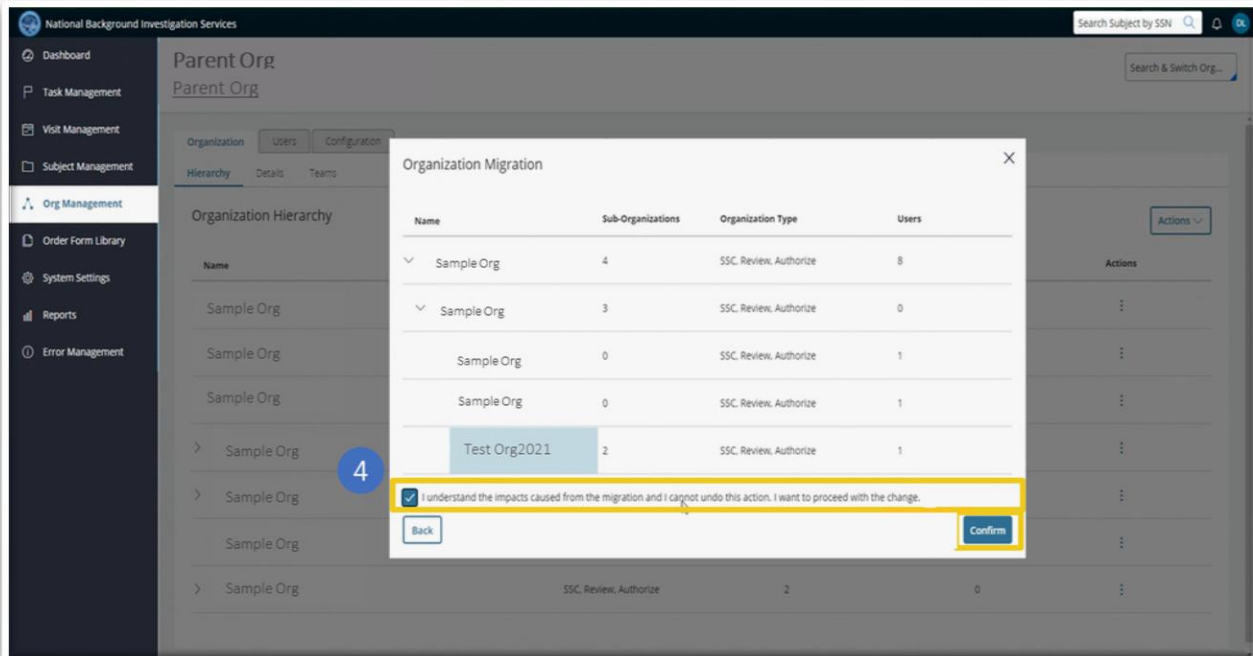
Step 3 Continued



Organization Migration

Name	Sub-Organizations	Organization Type	Users	Actions
Marti Test ★	1	SSC, Review, Authorize	1	Move Here
Mobile Technologies	1	SSC, Screening, Facility Security Office, Review, Authorize	0	Move Here
My Org ★	0	SSC, Authorize, Review	1	Move Here
NDT Test ★	1	SSC, Appeals, Adjudication, Review	1	Move Here
Pepsi Test ★	1	SSC, Review, Authorize, Adjudication, Appeals	1	Move Here
Rayback Test ★	1	SSC, Review, Authorize, Appeals, Adjudication	1	Move Here

Step 4



Organization Migration

Name	Sub-Organizations	Organization Type	Users	Actions
Sample Org	4	SSC, Review, Authorize	8	⋮
Sample Org	3	SSC, Review, Authorize	0	⋮
Sample Org	0	SSC, Review, Authorize	1	⋮
Sample Org	0	SSC, Review, Authorize	1	⋮
Test Org2021	2	SSC, Review, Authorize	1	⋮

☒ I understand the impacts caused from the migration and I cannot undo this action. I want to proceed with the change.

Back Confirm



USER MANAGEMENT

User Role Required: User Manager. The User Manager is responsible for creating & updating user profiles, assigning & updating appropriate user roles based on user responsibilities.

Purpose and Overview: Users are assigned roles and capabilities in NBIS through the process of User Management.

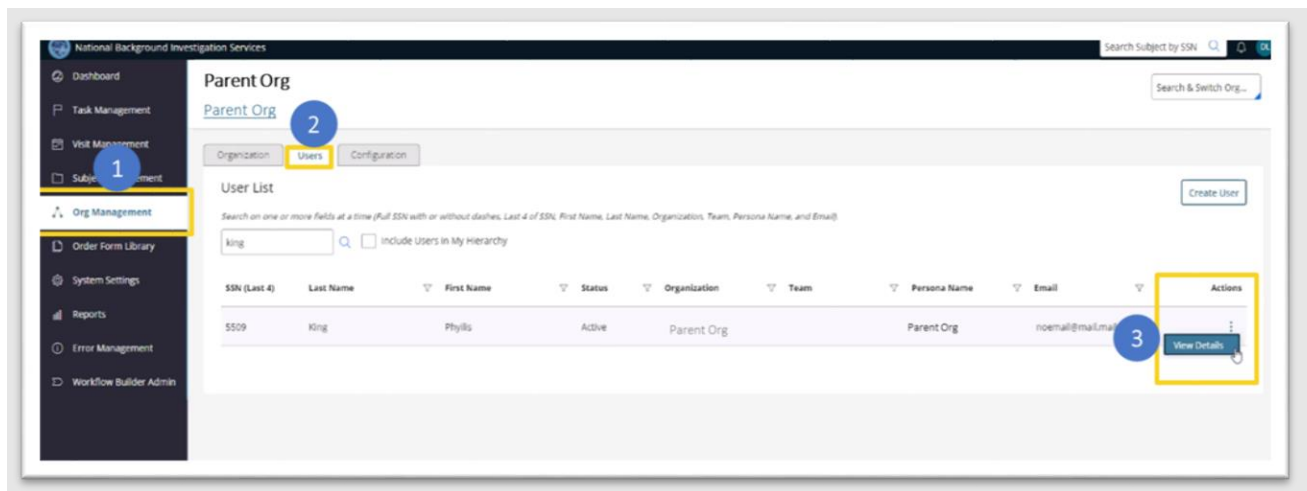
This is a **mandatory** configuration. User roles must be established to allow users to complete tasks and access information within NBIS.

HOW TO VIEW USER PROFILES

Purpose and Overview: User Managers can view user profiles within an organization hierarchy. The user profile provides user details and access to modify user information and roles.

Below is the 3-step process for viewing existing users in NBIS:

1. Navigate to **Org Management** on the left-hand side of the navigation panel and switch to the designated org (if needed).
2. Select the **Users** tab to view a list of users within the selected organization.
3. From the Actions column, select the **ellipses** icon next to the desired user row, then select **View Details** to view the User's profile details.





HOW TO GRANT USERS ACCESS TO NBIS

Purpose and Overview: Prior to creating a new user, an organization must receive the user's completed PSSAR form and necessary training certifications. The user then must be created in NBIS and added to their specific organization(s) with the appropriate user role(s).

1. Users must submit a completed [Personnel Security System Access Request \(PSSAR\) form](#) to the Organization's Onboarding Manager(s) or the designated User Manager for the org the user requires access to.
2. Once the User's PSSAR has been completed, reviewed, and approved, the User can be granted access to the NBIS System.
3. A more detailed overview of the process is included in the NBIS PSSAR & User Provisioning Instructions.

HOW TO ADD USERS AND USER PERSONAS

Purpose and Overview: Users are first created and then given a persona to carry out their specific duties. A persona represents the organization/agency the user will be conducting work on behalf of. Most users will only need one persona; however some users may conduct personnel vetting work on behalf on multiple agencies and therefore will require a persona for each agency.

Below is the 11-step process for how to grant NBIS system access, create a user, and add a Persona to a User:

1. Navigate to [Org Management](#) on the left-hand side of the navigation panel and switch to the designated org (if needed).
2. Select the [Users](#) tab.
3. From the right-hand side, select [Create User](#) button.
4. In the SSN Search text box, enter the user's [social security number](#) (located in Block 11 of the PSSAR) and select [Continue](#). If the user does not exist in the system, the Create User screen will populate.
 - a. **Note:** If the user already exists, the existing user profile will display, see View User for more information. User Managers will be able to modify the SSN and DOB after the user is created.
5. Fill in the required Personally Identified Information (PII) under [User Profile](#), indicated with a red asterisk.
 - a. **Note:** The user's first and last name can be found in Block 1 of the PSSAR and their DOB can be found in Block 9.
6. After filling out all user information, select [Continue](#) to create a persona for the user.
 - a. **Note:** A Persona represents an account with its roles and privileges that the user will have for the org associated to the persona. A persona will also represent an account the user will use to login to the system.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

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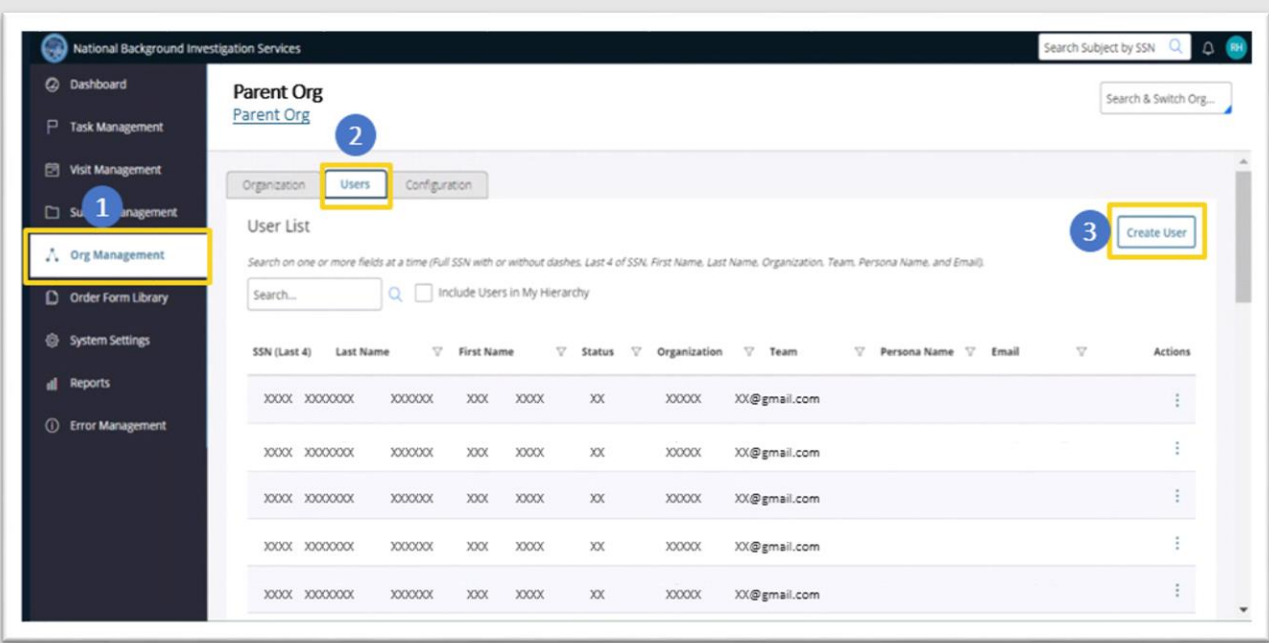
7. In the Manage Persona Settings tab, it is recommended as best practice to provide the agency name or acronym as the user's **Persona Name**. The Persona Name cannot be changed once the persona is created.
8. Enter **Primary Phone Number** (PSSAR Block 4) and **Email Address** (PSSAR Block 5). Select a **Notification Preference** option and the appropriate **Time Zone**.
 - a. **Note:** The internal option displays notification alerts in the top right corner of the application where the bell symbol is located. The email option will route notifications to the primary email address entered for the user.
9. Select **Add Attachment** to upload required documents. Users will receive a pop-up asking: "Are you sure you want to upload a file." Select "Browse" to search your files for the required documents. Select the following Attachment Categories for the required documents listed below:
 - a. System Authorization Access Request (PSSAR Form)
 - b. Training Certificate (Cyber-awareness Training Certificate and PII Training Certificate)
10. The organization context should be pre-populated based on the org in which the user with the User Manager role is creating the persona. Select the **User Roles** the user will be granted within the organization. At least one role must be selected at the time of creation. Enable is automatically selected as Organization User Status. Users can add additional orgs by selecting +Add Organization.
 - **Note:** Users can also add User Assignments by entering information in the Manage User Assignments tab. The full process for how to add a User Assignment will be covered in the "Add User Assignments Template to a User" task. Users will receive a pop-up asking if they'd like to proceed with completing the User Profile if they do not create a User Assignment.
11. Select **Complete User Profile** to save it.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1-3



National Background Investigation Services

Search Subject by SSN

Parent Org

Search & Switch Org...

Organization Users Configuration

User List

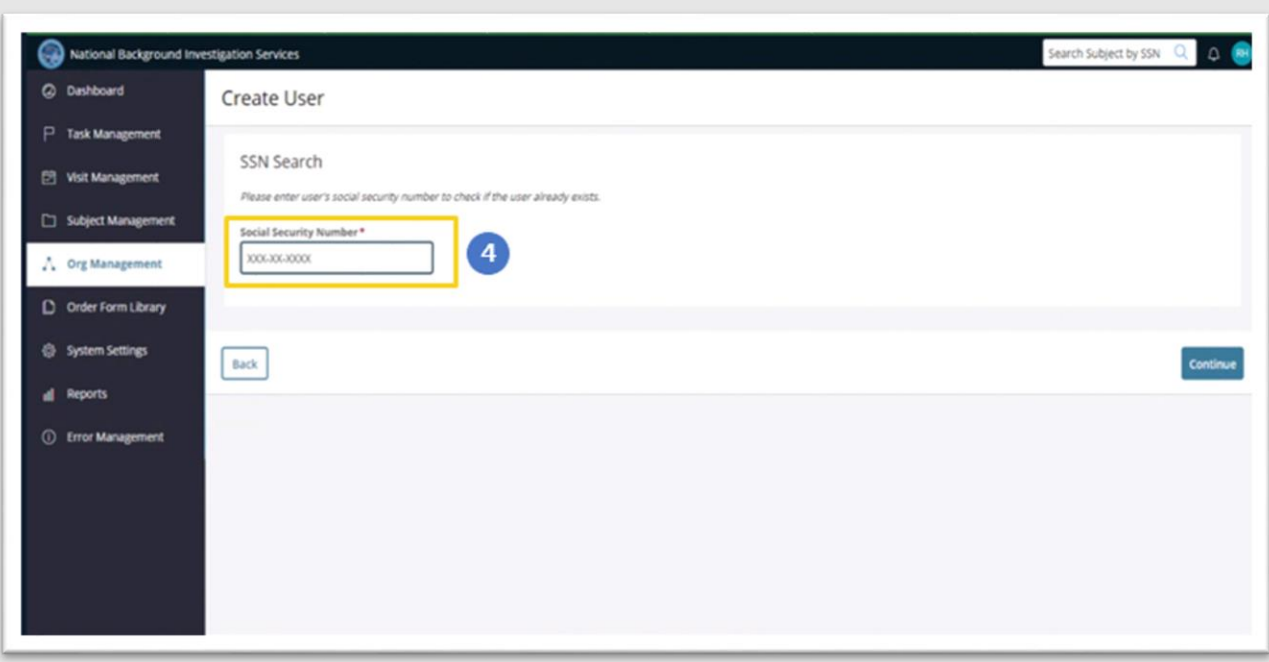
Search on one or more fields at a time (Full SSN with or without dashes, Last 4 of SSN, First Name, Last Name, Organization, Team, Persona Name, and Email).

Search... ☐ Include Users in My Hierarchy

SSN (Last 4)	Last Name	First Name	Status	Organization	Team	Persona Name	Email	Actions
XXXX	XXXXXXXX	XXXXXX	XXX	XXXX	XX	XXXXXX	XX@gmail.com	...
XXXX	XXXXXXXX	XXXXXX	XXX	XXXX	XX	XXXXXX	XX@gmail.com	...
XXXX	XXXXXXXX	XXXXXX	XXX	XXXX	XX	XXXXXX	XX@gmail.com	...
XXXX	XXXXXXXX	XXXXXX	XXX	XXXX	XX	XXXXXX	XX@gmail.com	...
XXXX	XXXXXXXX	XXXXXX	XXX	XXXX	XX	XXXXXX	XX@gmail.com	...

Create User

Step 4



National Background Investigation Services

Search Subject by SSN

Create User

SSN Search

Please enter user's social security number to check if the user already exists.

Social Security Number*

XXX-XX-XXXX

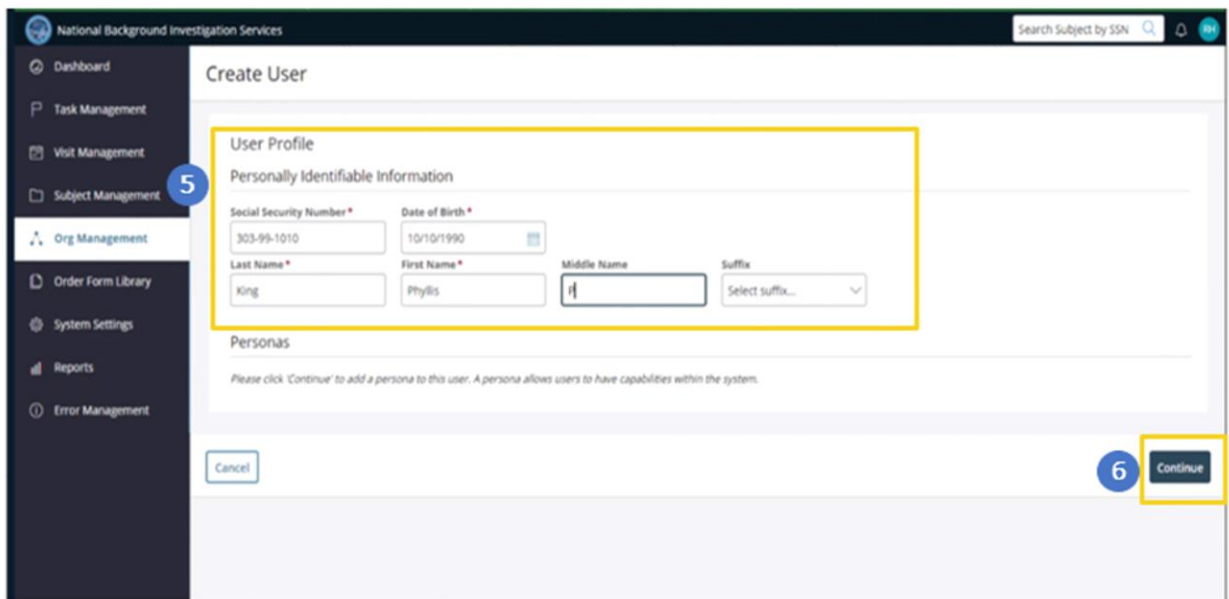
Back Continue



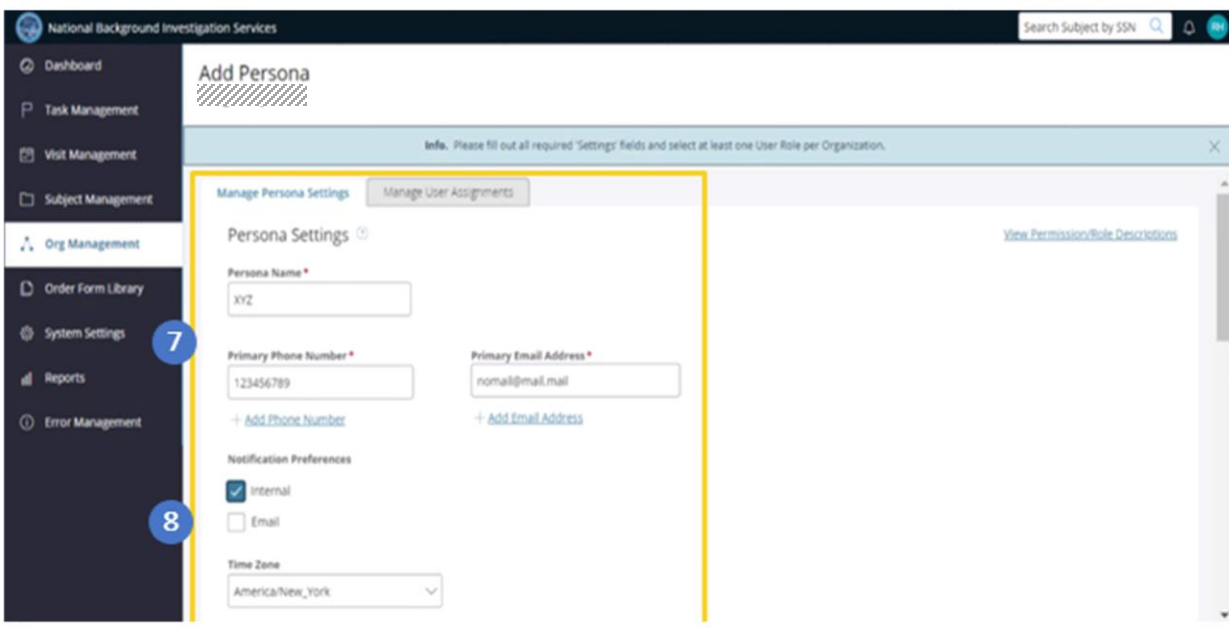
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 5-6



Steps 7-8

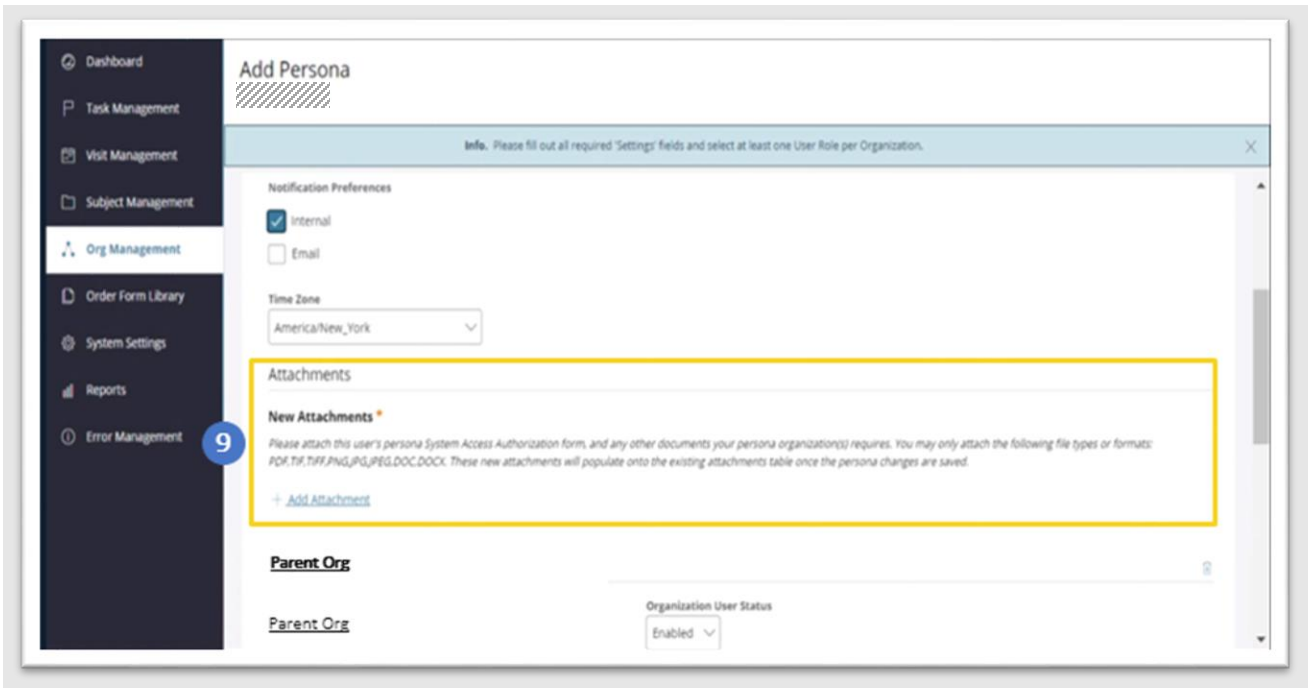




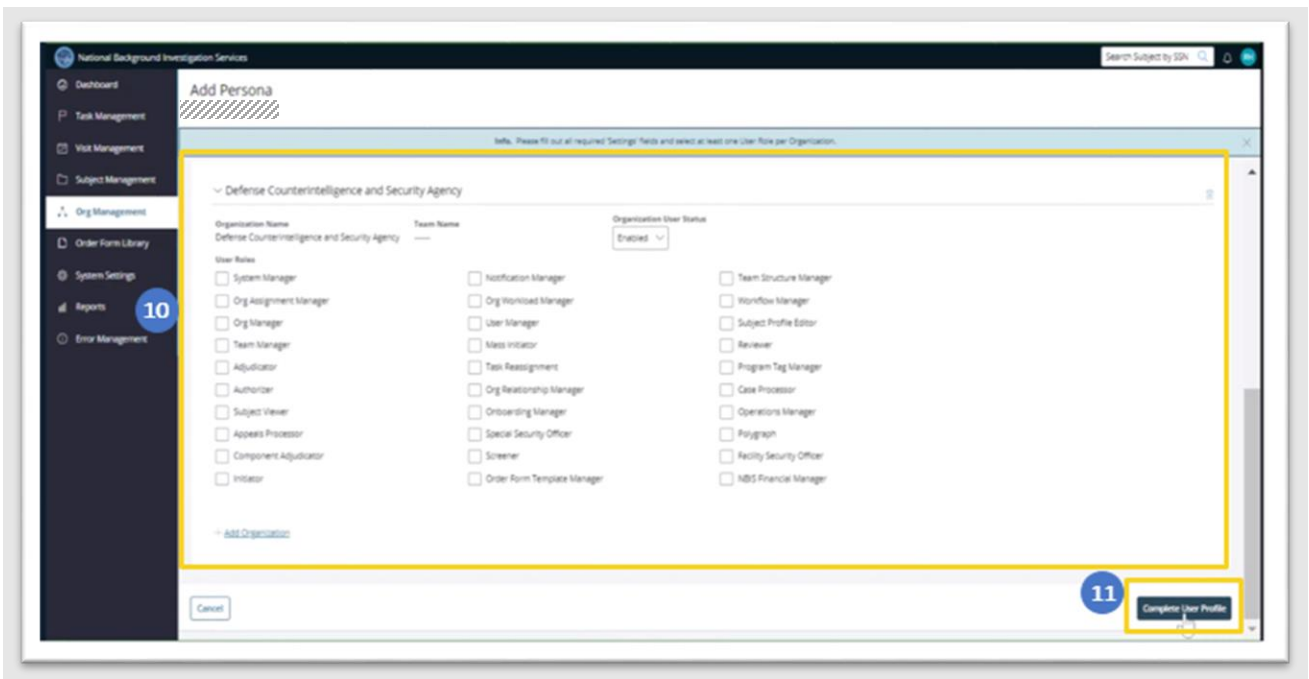
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 9



Steps 10-11





HOW TO ADD AN ORGANIZATION AND MODIFY ROLES IN EXISTING USER PERSONAS

Purpose and Overview: In order to grant user roles within an organization in NBIS, the User Manager role must assign the organization to the user persona.

Below is the 9-step process for adding an organization to an existing user's persona after the organization has been created:

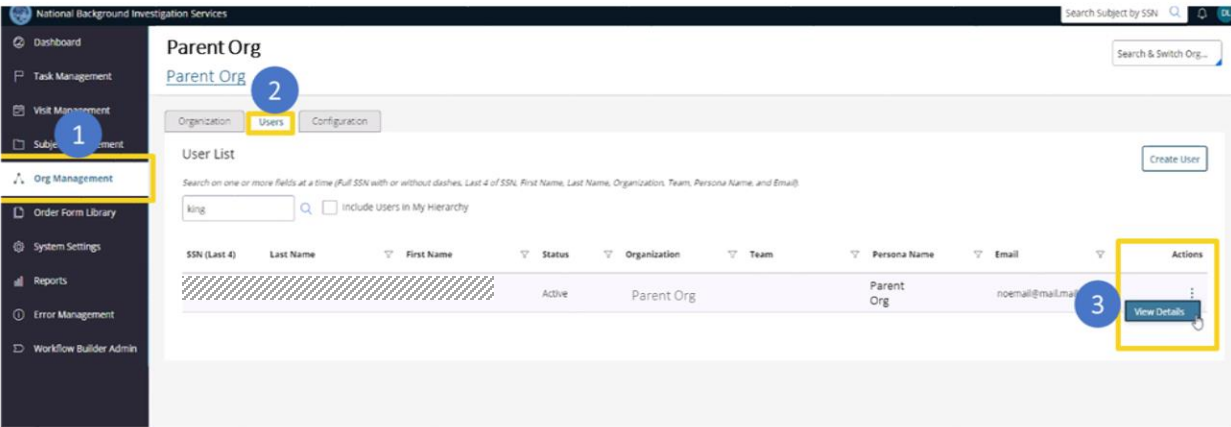
1. Navigate to **Org Management** on the left-hand side of the navigation panel and switch to the designated org (if needed).
2. Select the **Users** tab and navigate to the row showing the desired user.
3. Select the **ellipses** underneath the Action column and select **View Details**.
4. Select the desired **hyperlinked Persona Name** to navigate to the Manage Persona Settings tab.
5. Scroll down to the bottom of the page and select **Edit** on the bottom right-hand side.
 - a. User roles for existing orgs can now be added/removed/modified.
6. To add the user to an additional organization, scroll down and select the hyperlink **+Add Organization** in the bottom-left side underneath the User Roles field.
7. A pop-up will appear where you can search for an organization. Once you find the organization you want to assign to the user persona, select **"Add Organization."**
8. Select the appropriate user roles for the newly added organization.
9. Select **Save** in the bottom right-hand corner to complete the process of adding an organization to a User's Persona.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1-3



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Parent Org

Organization Users Configuration

User List

Create User

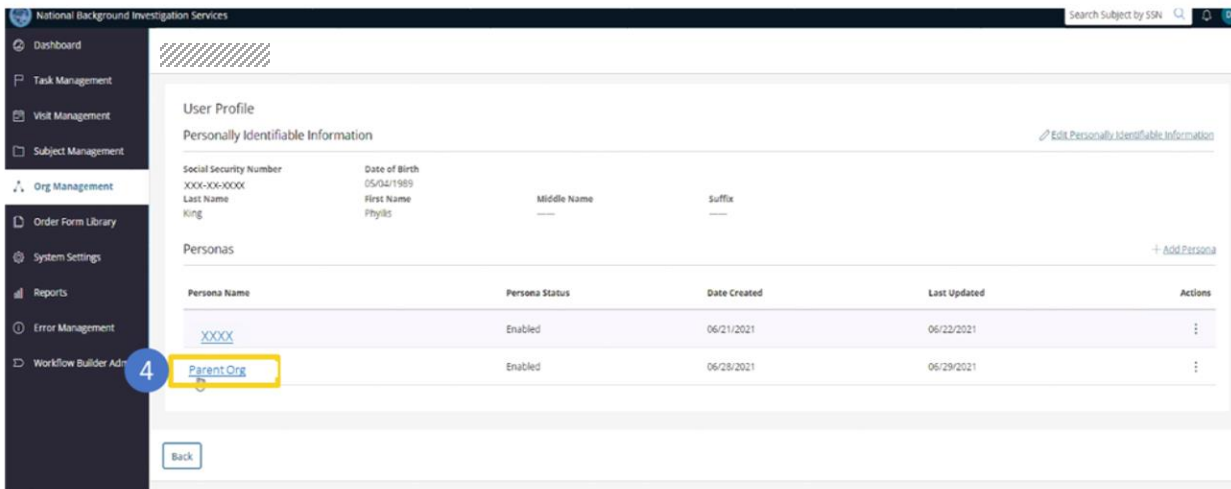
Search on one or more fields at a time (Full SSN with or without dashes, Last 4 of SSN, First Name, Last Name, Organization, Team, Persona Name, and Email)

king

Include Users in My Hierarchy

SSN (Last 4)	Last Name	First Name	Status	Organization	Team	Persona Name	Email	Actions
			Active	Parent Org		Parent Org	noemail@mailma	View Details

Step 4



National Background Investigation Services

Search Subject by SSN

User Profile

Personally Identifiable Information

Edit Personally Identifiable Information

Social Security Number: XXX-XX-XXXX, Date of Birth: 05/04/1989, Last Name: KING, First Name: Phyllis, Middle Name: ---, Suffix: ---

Personas

+ Add Persona

Persona Name	Persona Status	Date Created	Last Updated	Actions
XXXX	Enabled	06/21/2021	06/22/2021	
Parent Org	Enabled	06/28/2021	06/29/2021	

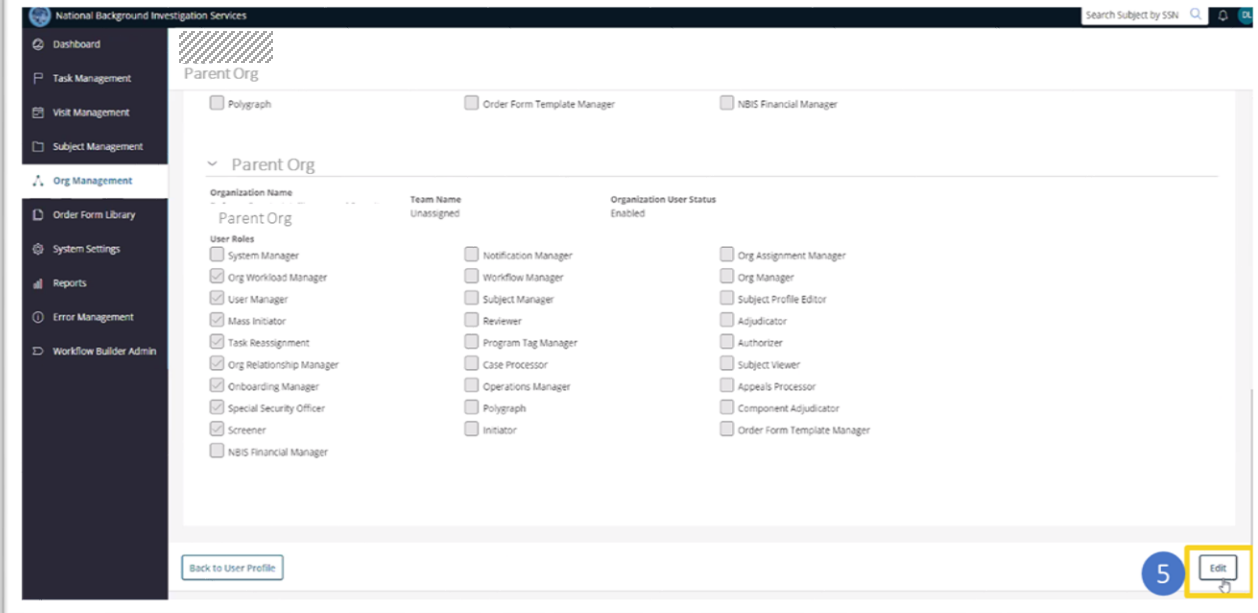
Back



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 5



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

Workflow Builder Admin

Parent Org

Polygraph

Order Form Template Manager

NBIS Financial Manager

Parent Org

Organization Name

Team Name

Organization User Status

Parent Org

Unassigned

Enabled

User Roles

System Manager

Org Workload Manager

User Manager

Mass Initiator

Task Reassignment

Org Relationship Manager

Onboarding Manager

Special Security Officer

Screener

NBIS Financial Manager

Notification Manager

Workflow Manager

Subject Manager

Reviewer

Program Tag Manager

Case Processor

Operations Manager

Polygraph

Initiator

Org Assignment Manager

Org Manager

Subject Profile Editor

Adjudicator

Authorizer

Subject Viewer

Appeals Processor

Component Adjudicator

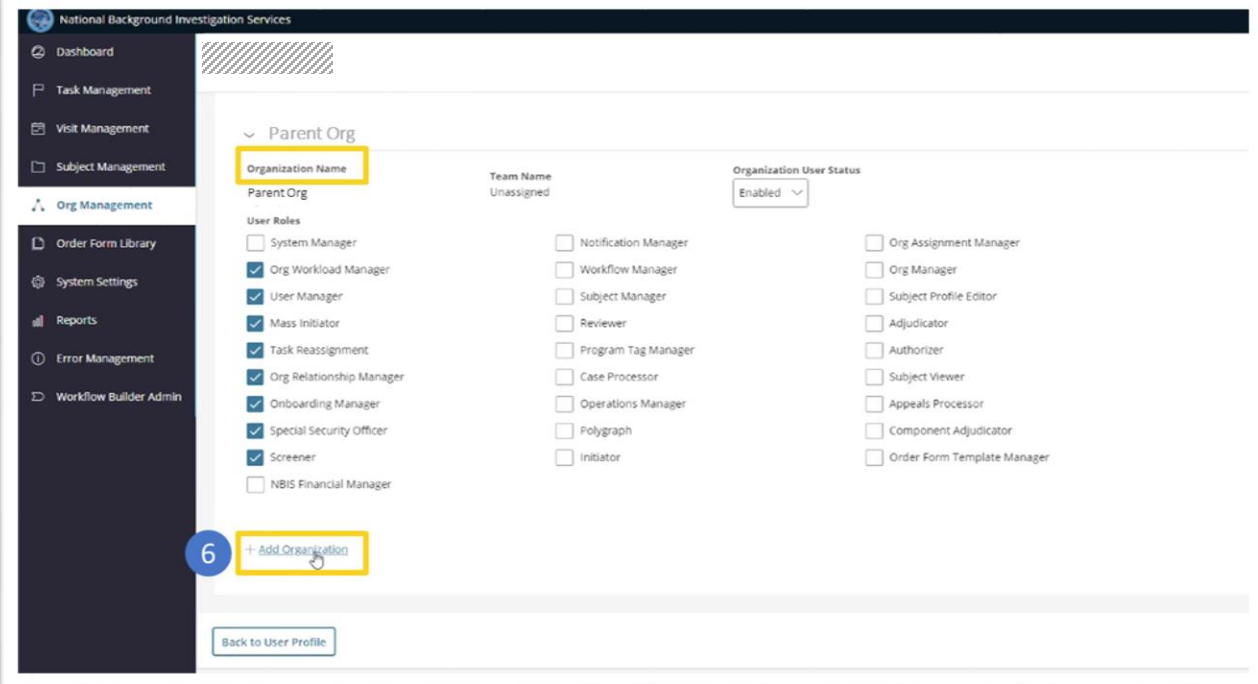
Order Form Template Manager

Back to User Profile

5

Edit

Step 6



National Background Investigation Services

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Workflow Builder Admin

Parent Org

Organization Name

Team Name

Organization User Status

Parent Org

Unassigned

Enabled

User Roles

System Manager

Org Workload Manager

User Manager

Mass Initiator

Task Reassignment

Org Relationship Manager

Onboarding Manager

Special Security Officer

Screener

NBIS Financial Manager

Notification Manager

Workflow Manager

Subject Manager

Reviewer

Program Tag Manager

Case Processor

Operations Manager

Polygraph

Initiator

Org Assignment Manager

Org Manager

Subject Profile Editor

Adjudicator

Authorizer

Subject Viewer

Appeals Processor

Component Adjudicator

Order Form Template Manager

Back to User Profile

6

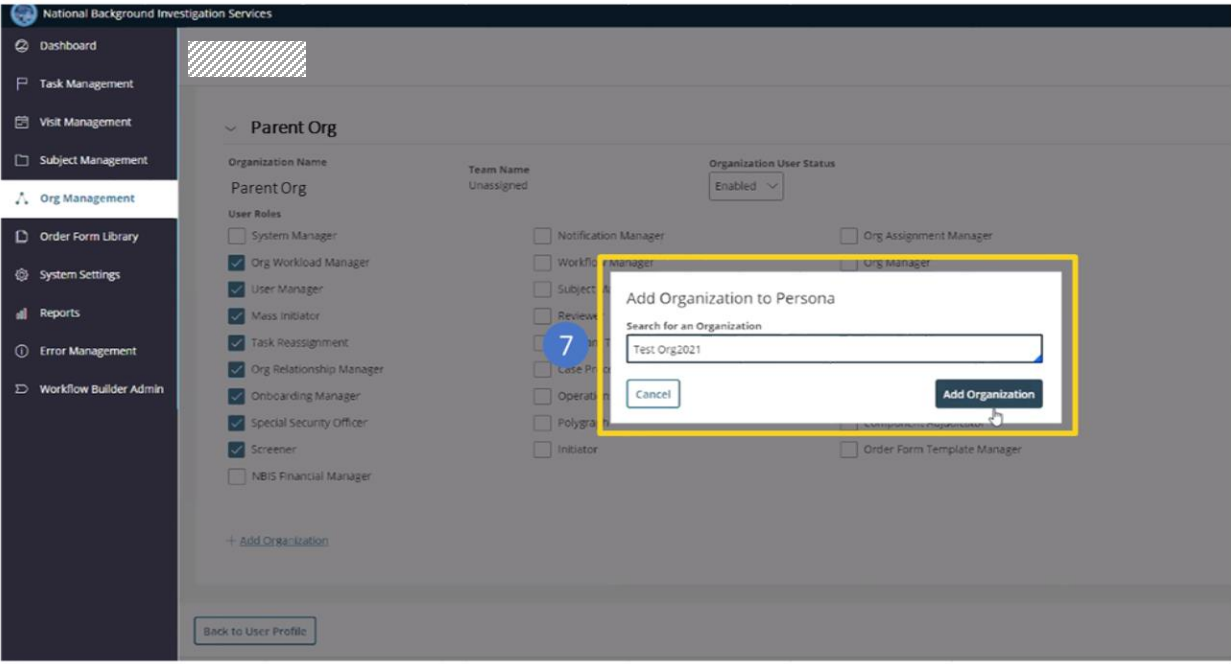
+ Add Organization



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 7



National Background Investigation Services

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Workflow Builder Admin

Parent Org

Organization Name: Parent Org

Team Name: Unassigned

Organization User Status: Enabled

User Roles:

- ☐ System Manager
- ☒ Org Workload Manager
- ☒ User Manager
- ☒ Mass Initiator
- ☒ Task Reassignment
- ☒ Org Relationship Manager
- ☒ Onboarding Manager
- ☒ Special Security Officer
- ☒ Screener
- ☐ NBIS Financial Manager
- ☐ Notification Manager
- ☐ Workflow Manager
- ☐ Subject Manager
- ☐ Reviewer
- ☐ Case Processor
- ☐ Operations Manager
- ☐ Polygraph
- ☐ Initiator
- ☐ Org Assignment Manager
- ☐ Org Manager
- ☐ Appeals Processor
- ☐ Component Adjudicator
- ☐ Order Form Template Manager

+ Add Organization

Back to User Profile

Add Organization to Persona

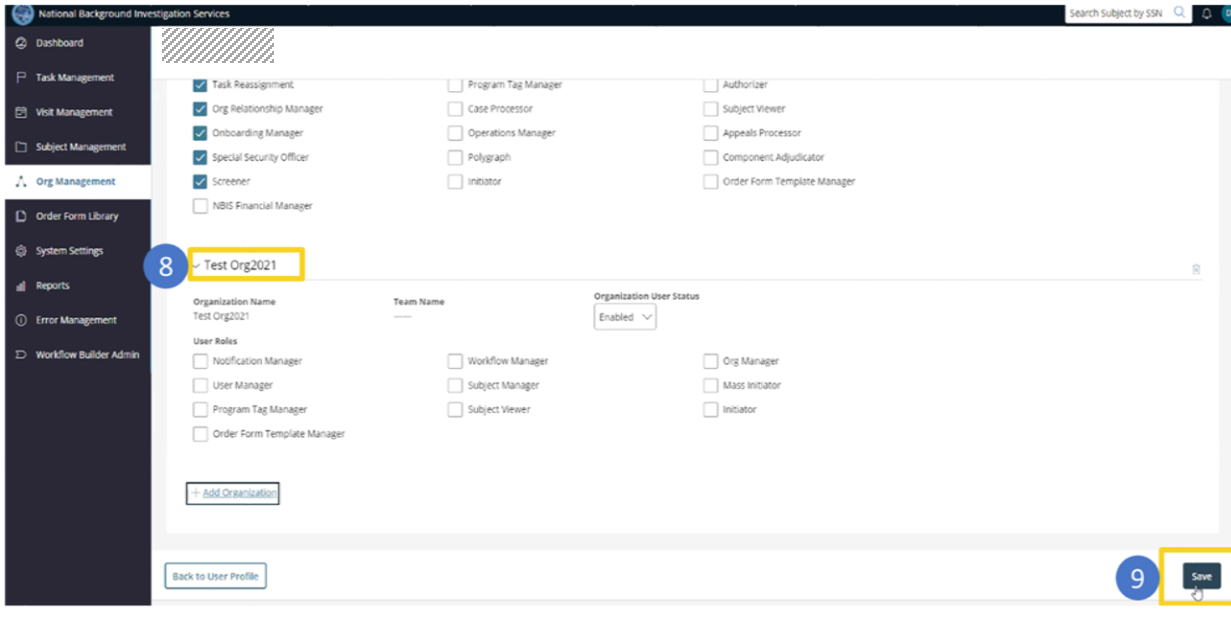
Search for an Organization

Test Org2021

Cancel

Add Organization

Steps 8-9



National Background Investigation Services

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Workflow Builder Admin

Test Org2021

Organization Name: Test Org2021

Team Name: ---

Organization User Status: Enabled

User Roles:

- ☒ Task Reassignment
- ☒ Org Relationship Manager
- ☒ Onboarding Manager
- ☒ Special Security Officer
- ☒ Screener
- ☐ NBIS Financial Manager
- ☐ Program Tag Manager
- ☐ Case Processor
- ☐ Operations Manager
- ☐ Polygraph
- ☐ Initiator
- ☐ Authorizer
- ☐ Subject Viewer
- ☐ Appeals Processor
- ☐ Component Adjudicator
- ☐ Order Form Template Manager
- ☐ Notification Manager
- ☐ Workflow Manager
- ☐ Subject Manager
- ☐ Subject Viewer
- ☐ Org Manager
- ☐ Mass Initiator
- ☐ Initiator

+ Add Organization

Back to User Profile

Save



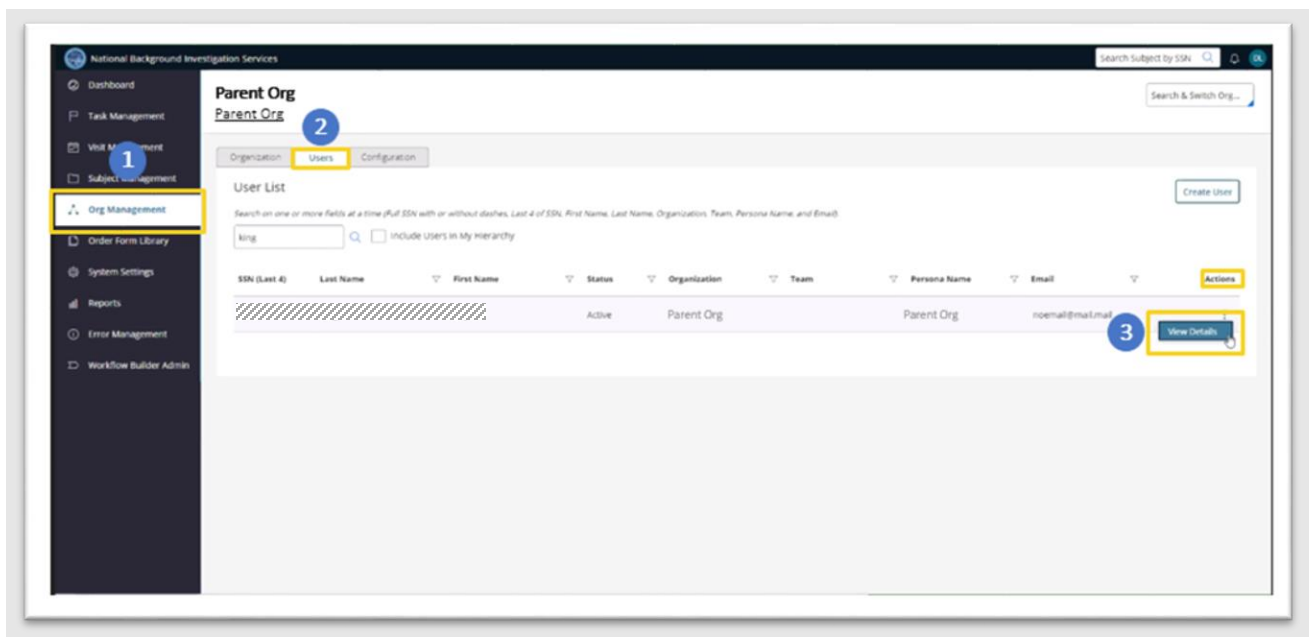
HOW TO EDIT USER'S PERSONALLY IDENTIFIABLE INFORMATION (PII)

Purpose and Overview: In the event that there are errors in users PII or need for updates (i.e. changes in last name), users with the User Manager role can edit the user's Personally Identifiable Information (PII) information as needed. Users are unable to edit their own profile.

Below is the 5-step process for editing a user's PII.

1. Navigate to **Org Management** on the left-hand side of the navigation panel and switch to the designated org (if needed).
2. Select the **Users** tab to see the list of users in the org a user is viewing.
3. To open a user profile, select the **ellipses** under the Action column next to the desired user. Select **View Details** to open user's profile.
4. Select the hyperlink **Edit Personally Identifiable Information** in the top right-hand corner.
5. Make the changes and select **Save**.

Steps 1-3

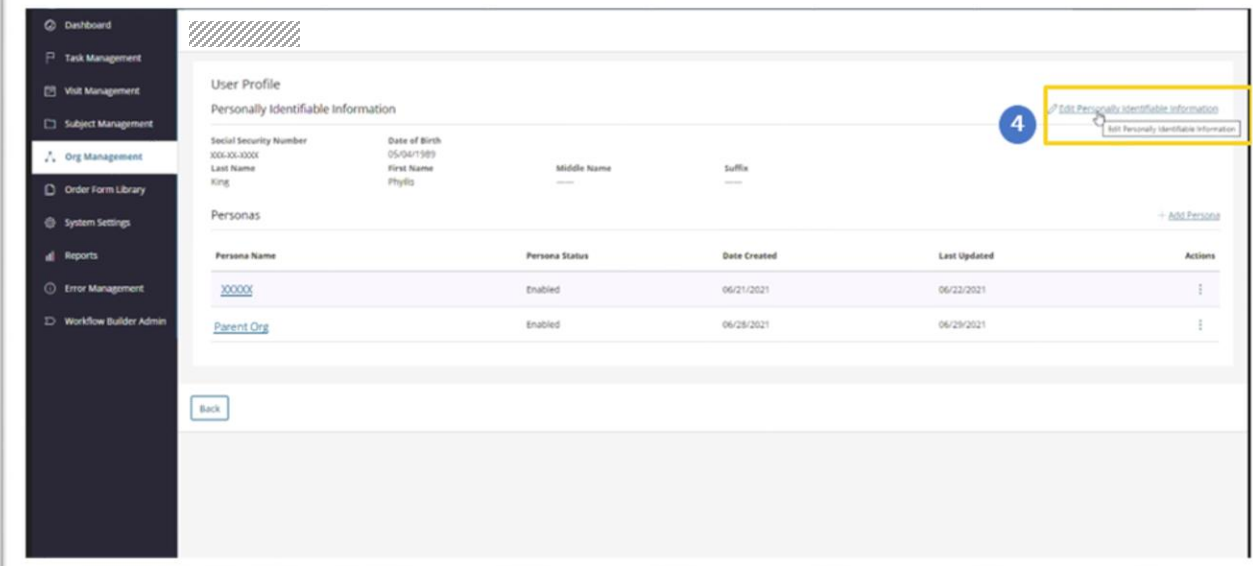




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 4



Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Workflow Builder Admin

User Profile

Personally Identifiable Information

[Edit Personally Identifiable Information](#)

[Edit Personally Identifiable Information](#)

Social Security Number: XXX-XX-XXXX

Date of Birth: 05/04/1989

Last Name: King

First Name: Phyllis

Middle Name: Enter Middle Name

Suffix: Select suffix...

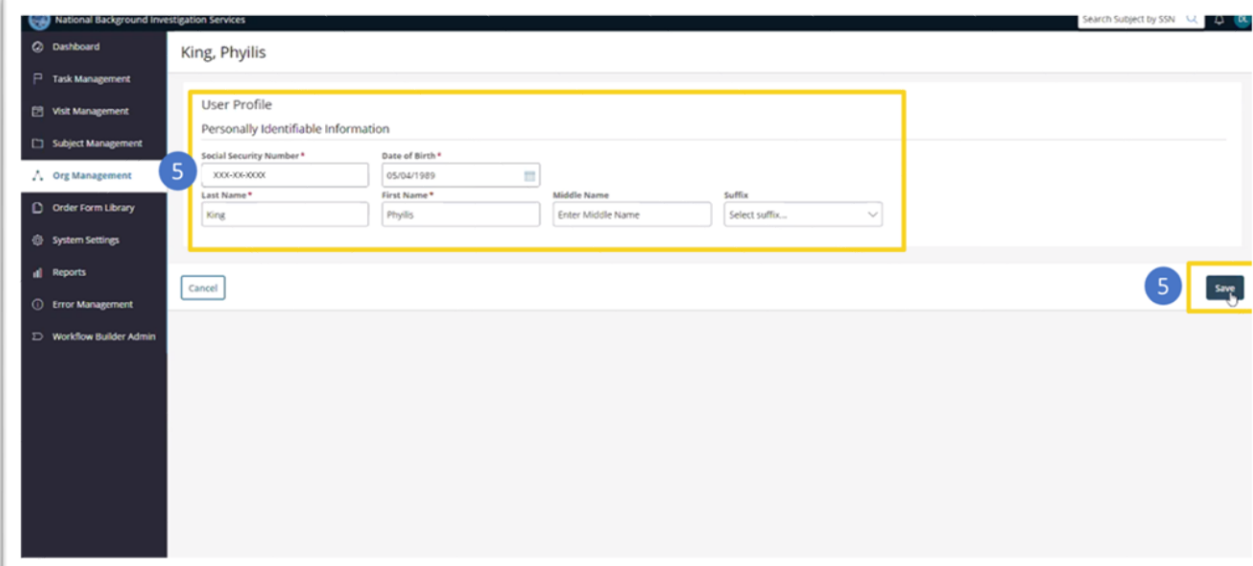
Personas

[+ Add Persona](#)

Persona Name	Persona Status	Date Created	Last Updated	Actions
XXXXXX	Enabled	06/21/2021	06/22/2021	...
Parent Org	Enabled	06/28/2021	06/29/2021	...

[Back](#)

Step 5



National Background Investigation Services

Search Subject by SSN

King, Phyllis

User Profile

Personally Identifiable Information

Social Security Number *

Date of Birth *

Last Name *

First Name *

Middle Name

Suffix

[Cancel](#)

[Save](#)



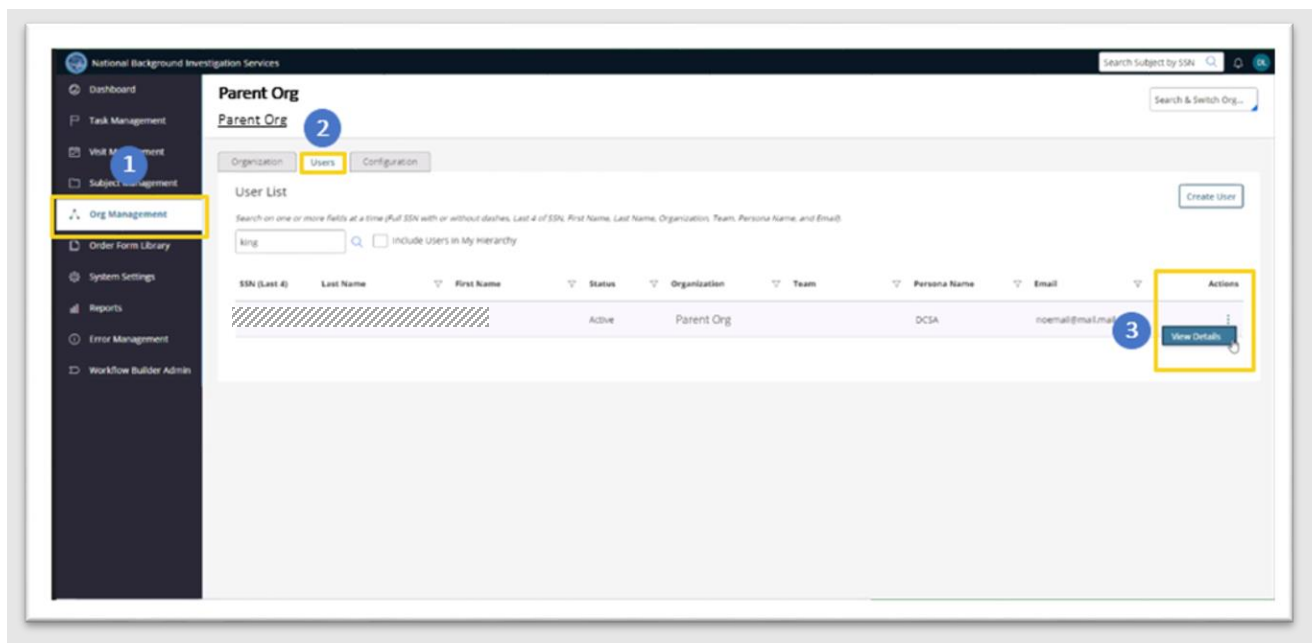
HOW TO EDIT USER PERSONA INFORMATION

Purpose and Overview: Users with the User Manager role can also edit a user's persona information to add/remove roles or organizations, as needed. It is important to note that if a persona is disabled, users will not be able to edit any information.

Below is the 6-step process for editing a user's Persona information:

1. Navigate to **Org Management** on the left-hand side of the navigation panel and switch to the designated Org (if needed).
2. Select the **Users** tab to view the list of users.
3. From the Actions column, select the **ellipses** next to the user row and then select **View Details** to view the user's profile.
4. In the **User Profile**, select a hyperlinked Persona Name to edit.
5. At the bottom right of the Persona Settings screen, select **Edit** to edit the persona details. This includes editing the primary phone number, email, notification preferences, time zone, attachments, disable the org, edit/delete the org associations/roles, add additional orgs and editing User Assignments.
6. Select **Save** to save the changes.

Steps 1-3

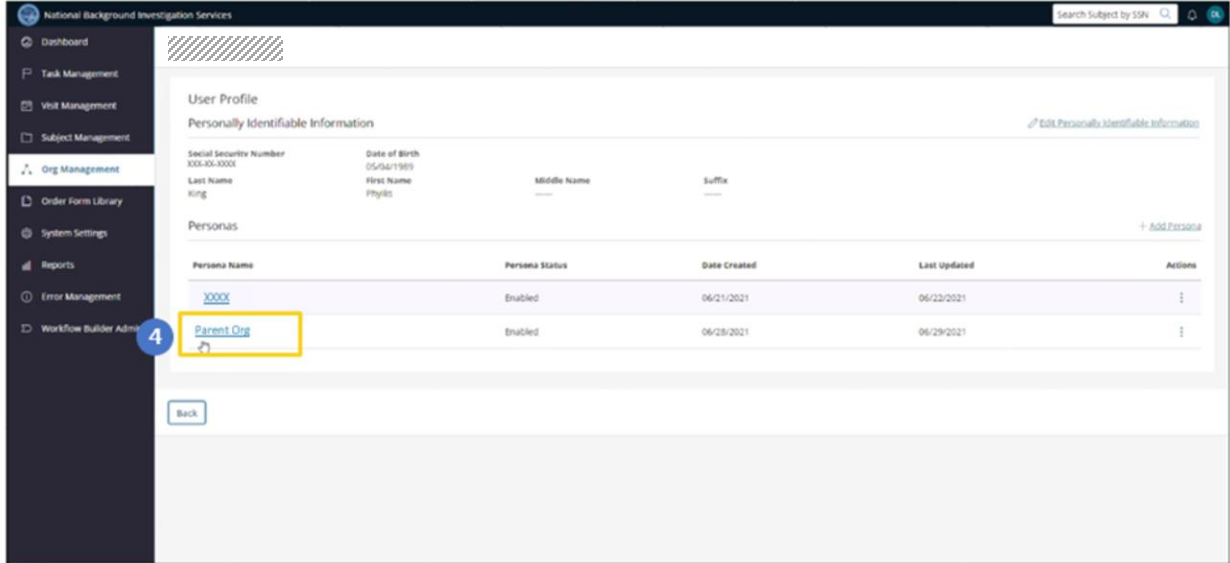




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 4



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 Workflow Builder Admin

User Profile

Personally Identifiable Information [Edit Personally Identifiable Information](#)

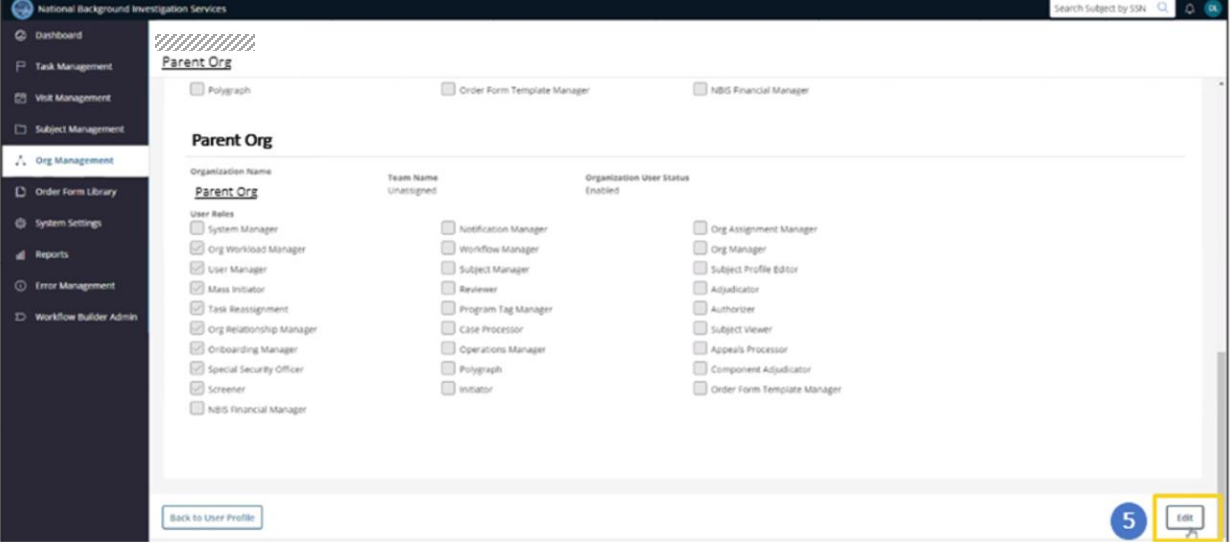
Social Security Number: XXX-XX-XXXX Date of Birth: (5/04/1985)
Last Name: King First Name: Phyllis Middle Name: Suffix:

Personas [+ Add Persona](#)

Persona Name	Persona Status	Date Created	Last Updated	Actions
XXXX	Enabled	06/21/2021	06/23/2021	
Parent Org	Enabled	06/28/2021	06/29/2021	

Back

Step 5



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 Workflow Builder Admin

Parent Org

☐ Polygraph ☐ Order Form Template Manager ☐ NBIS Financial Manager

Organization Name: [Parent Org](#) Team Name: Unassigned Organization User Status: Enabled

User Roles

<input type="checkbox"/> System Manager	<input type="checkbox"/> Notification Manager	<input type="checkbox"/> Org Assignment Manager
<input checked="" type="checkbox"/> Org Workload Manager	<input type="checkbox"/> Workflow Manager	<input type="checkbox"/> Org Manager
<input checked="" type="checkbox"/> User Manager	<input type="checkbox"/> Subject Manager	<input type="checkbox"/> Subject Profile Editor
<input checked="" type="checkbox"/> Mass Initiator	<input type="checkbox"/> Reviewer	<input type="checkbox"/> Authorizer
<input checked="" type="checkbox"/> Task Reassignment	<input type="checkbox"/> Program Tag Manager	<input type="checkbox"/> Subject Viewer
<input checked="" type="checkbox"/> Org Relationship Manager	<input type="checkbox"/> Case Processor	<input type="checkbox"/> Appeals Processor
<input checked="" type="checkbox"/> Onboarding Manager	<input type="checkbox"/> Operations Manager	<input type="checkbox"/> Component Adjudicator
<input checked="" type="checkbox"/> Special Security Officer	<input type="checkbox"/> Polygraph	<input type="checkbox"/> Order Form Template Manager
<input checked="" type="checkbox"/> Screener	<input type="checkbox"/> Initiator	
<input type="checkbox"/> NBIS Financial Manager		

Back to User Profile

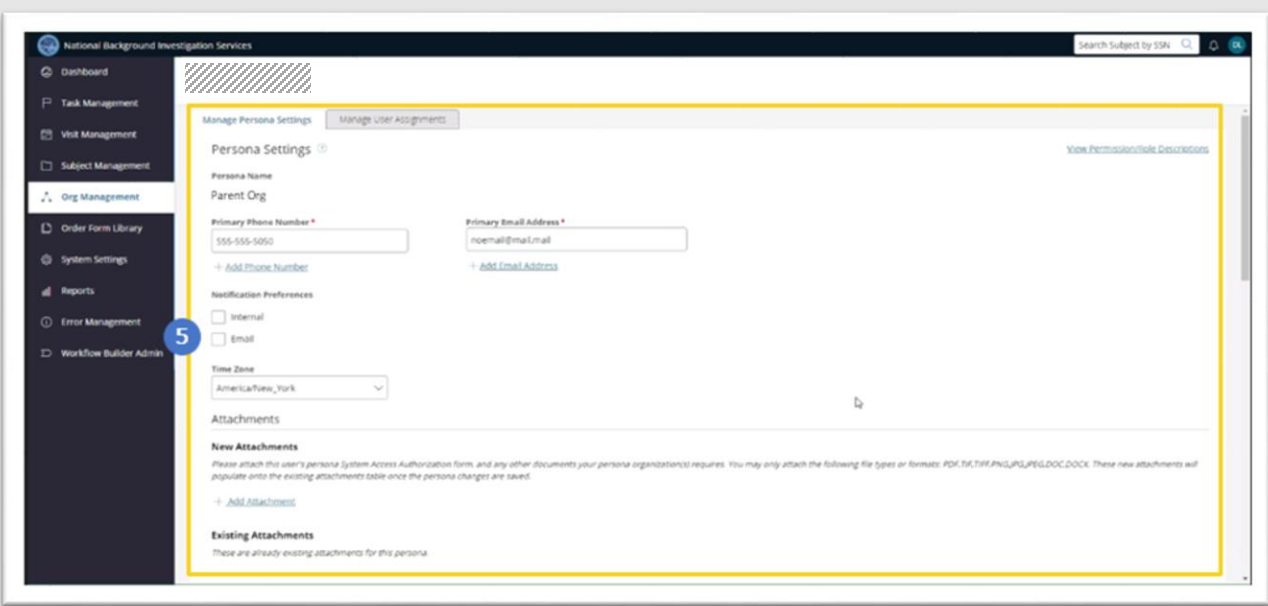
5 [Edit](#)



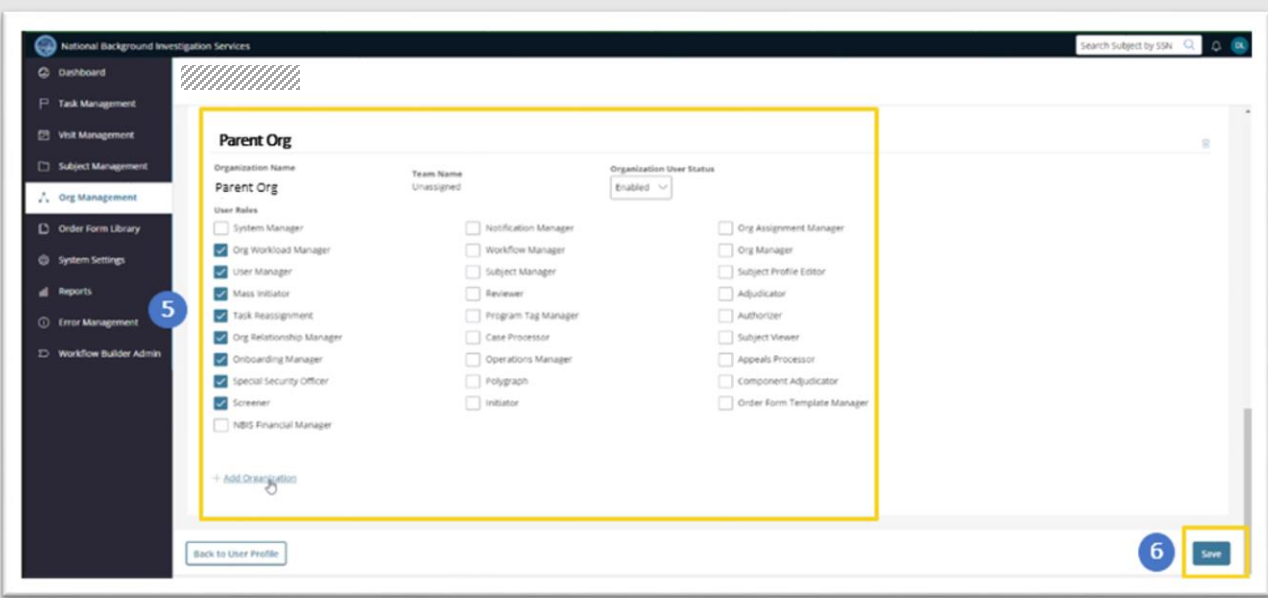
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 5 Continued



Steps 5-6





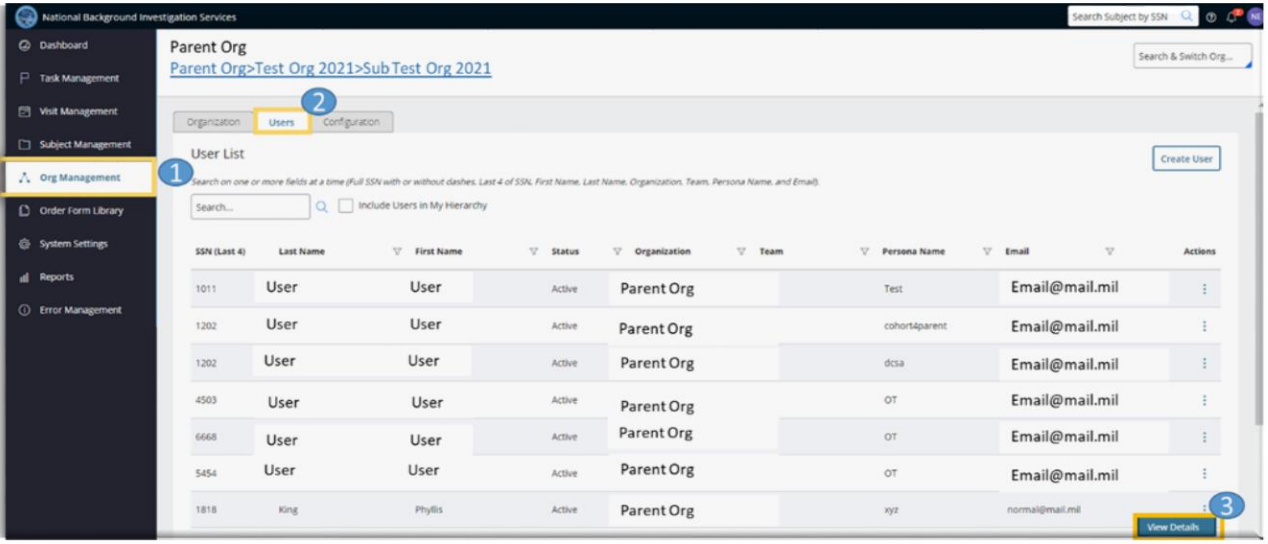
HOW TO DISABLE A USER PERSONA

Purpose and Overview: Users with the User Manager role can disable user's persona. There are multiple reasons why one would want to disable a user's persona. For example, a user was retired, fired, moved to a new job, or otherwise no longer needs NBIS access for their role in the organization. If a persona is disabled, all cases in that user's workbasket for the corresponding organization will return to their respective organization's workbasket.

Below is the 5-step process for disabling a Persona:

1. Navigate to **Org Management** on the left-hand side of the navigation panel and switch to the designated org (if needed).
2. Select the **Users** tab to view the list of users.
3. From the Actions column, select the **ellipses** next to the user persona to be disabled and then select **View Details**.
4. Once the profile loads, select the ellipses from the actions column next to the persona to be disabled. Select **Disable** to disable the persona and choose a reason for disabling. There's an option to provide an Explanation (ex. Moved to a New Job, Retirement, Fired or Other).
5. **Select Continue**. A green success banner will appear at the top of the screen and the Persona Status will appear as Disabled.

Steps 1-3



The screenshot shows the NBIS interface with the following components:

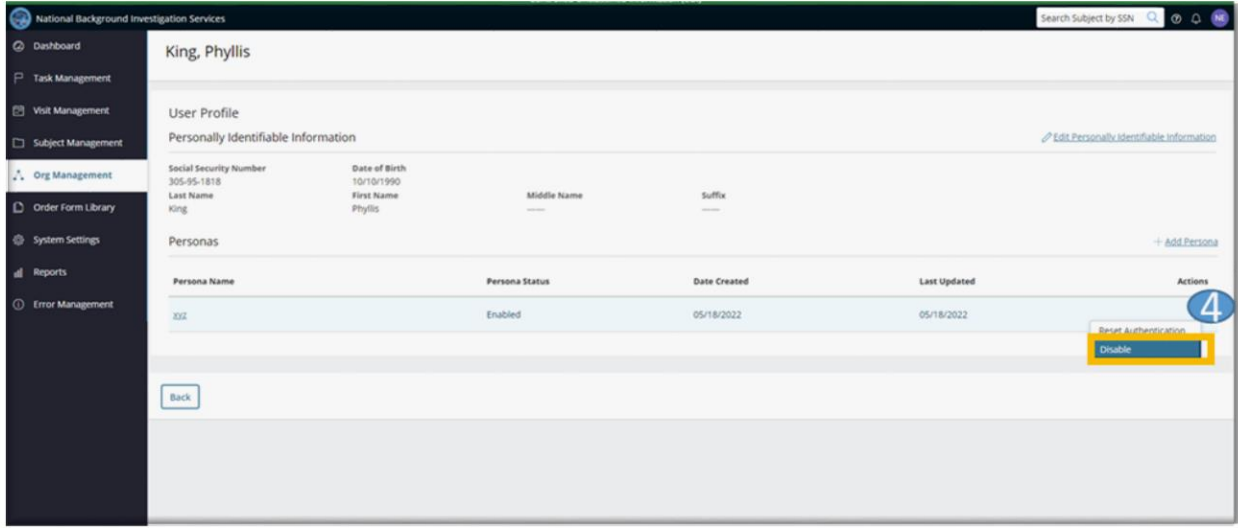
- Navigation Panel (Left):** Includes links for Dashboard, Task Management, Visit Management, Subject Management, **Org Management** (highlighted with a red box and a red circle 1), Order Form Library, System Settings, Reports, and Error Management.
- Header:** "National Background Investigation Services" and a search bar "Search Subject by SSN".
- Breadcrumbs:** "Parent Org" > "Parent Org>Test Org 2021>Sub Test Org 2021".
- Tabs:** "Organization", "Users" (highlighted with a red box and a red circle 2), and "Configuration".
- User List:** A table with columns: SSN (Last 4), Last Name, First Name, Status, Organization, Team, Persona Name, Email, and Actions. The table contains 7 rows of user data. The "Actions" column for each row contains an ellipsis icon.
- Buttons:** "Create User" (top right) and "View Details" (bottom right, highlighted with a red box and a red circle 3).



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 4



National Background Investigation Services

Search Subject by SSN

King, Phyllis

User Profile

Personally Identifiable Information

[Edit Personally Identifiable Information](#)

Social Security Number: 305-95-1818
Date of Birth: 10/10/1990
Last Name: King
First Name: Phyllis
Middle Name: ---
Suffix: ---

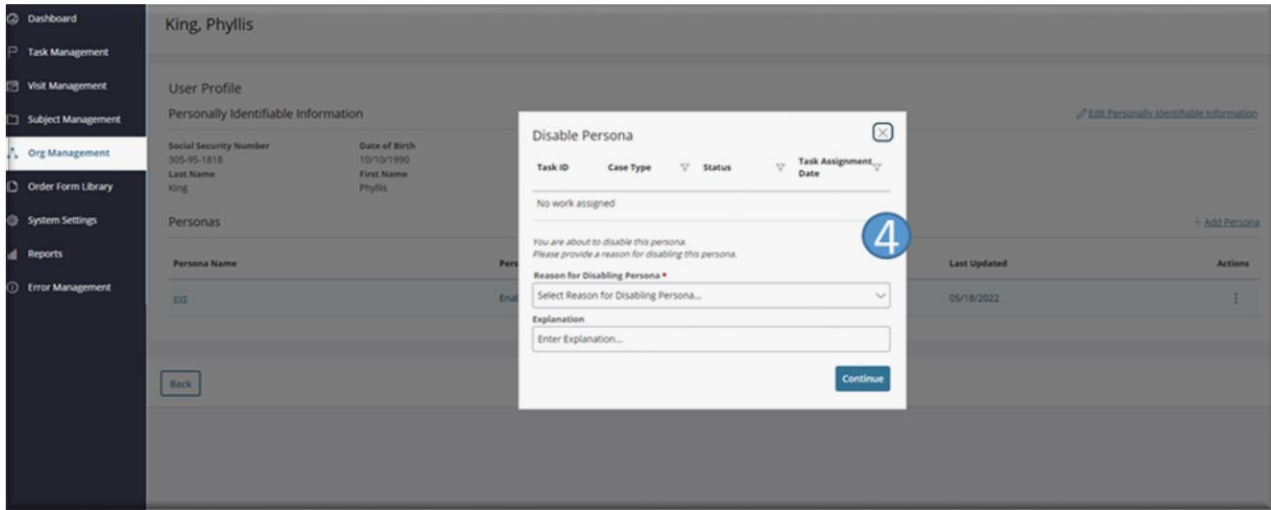
[Add Persona](#)

Personas

Persona Name	Persona Status	Date Created	Last Updated	Actions
X02	Enabled	05/18/2022	05/18/2022	Reset Authentication Disable

[Back](#)

Step 4 continued



King, Phyllis

User Profile

Personally Identifiable Information

[Edit Personally Identifiable Information](#)

Social Security Number: 305-95-1818
Date of Birth: 10/10/1990
Last Name: King
First Name: Phyllis

Personas

Persona Name	Persona Status	Date Created	Last Updated	Actions
X02	Enabled	05/18/2022	05/18/2022	Reset Authentication Disable

[Back](#)

Disable Persona

Task ID	Case Type	Status	Task Assignment Date
No work assigned			

You are about to disable this persona.
Please provide a reason for disabling this persona.

Reason for Disabling Persona

Select Reason for Disabling Persona...

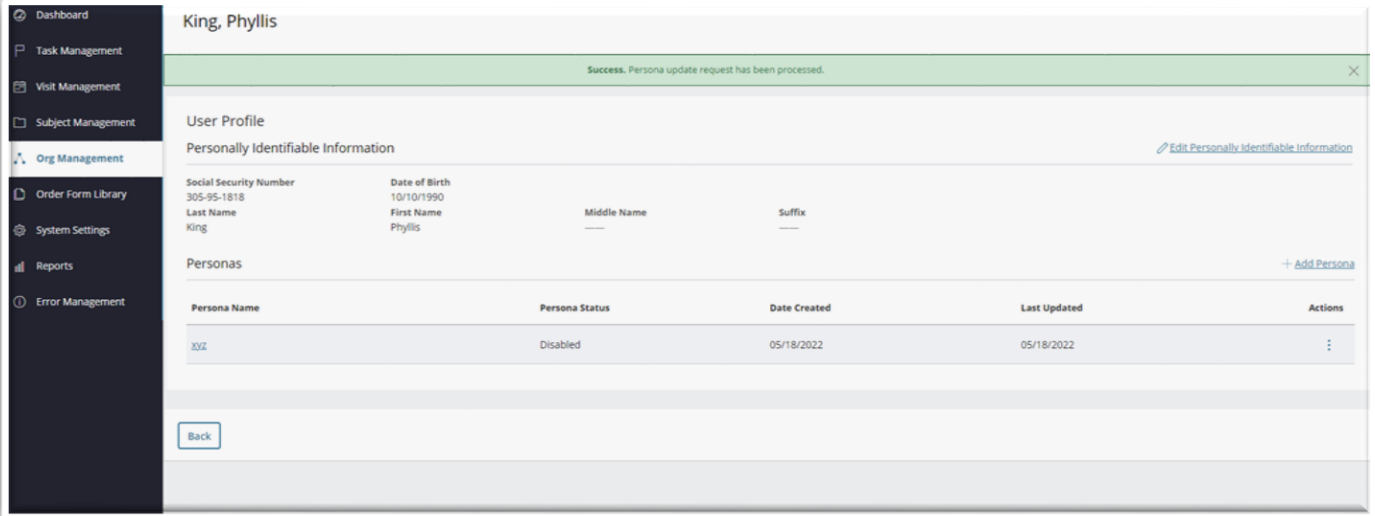
Explanation

Enter Explanation...

[Continue](#)



Step 5



King, Phyllis

Success. Persona update request has been processed.

User Profile

Personally Identifiable Information [Edit Personally Identifiable Information](#)

Social Security Number	Date of Birth		
305-95-1818	10/10/1990		
Last Name	First Name	Middle Name	Suffix
King	Phyllis		

Personas [+ Add Persona](#)

Persona Name	Persona Status	Date Created	Last Updated	Actions
XYZ	Disabled	05/18/2022	05/18/2022	...

[Back](#)

HOW TO ENABLE A USER PERSONA

Purpose and Overview: Users with the User Manager role can also enable a user's persona. The Enable option will appear once a persona is disabled if you want to re-enable it.

Below is the 5-step process for enabling a Persona:

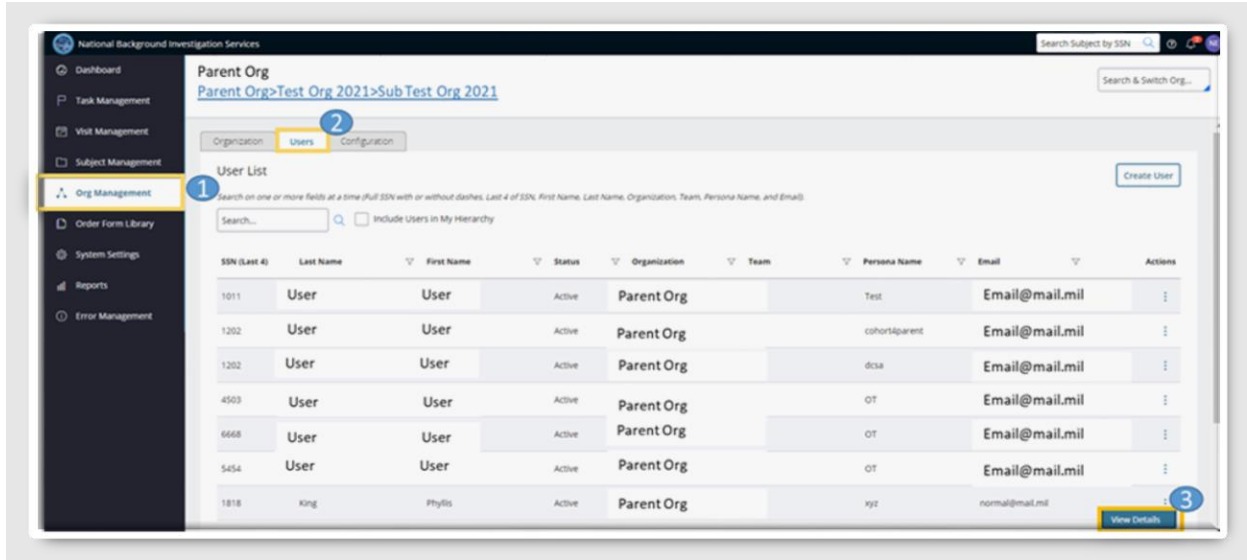
1. Navigate to **Org Management** on the left-hand side of the navigation panel and switch to the designated Org (if needed).
2. Select the **Users** tab to view the list of users.
3. From the Actions column, select the **ellipses** next to the user row and then select **View Details**.
4. To Enable a Persona, choose the **Enable** option from the ellipsis's icon under the Actions column to re-enable. A confirmation screen will appear with an explanation of why the persona was disabled.
5. Select **Continue**. A green success banner will appear at the top of the screen and the Persona Status will go back to Enabled.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1-3



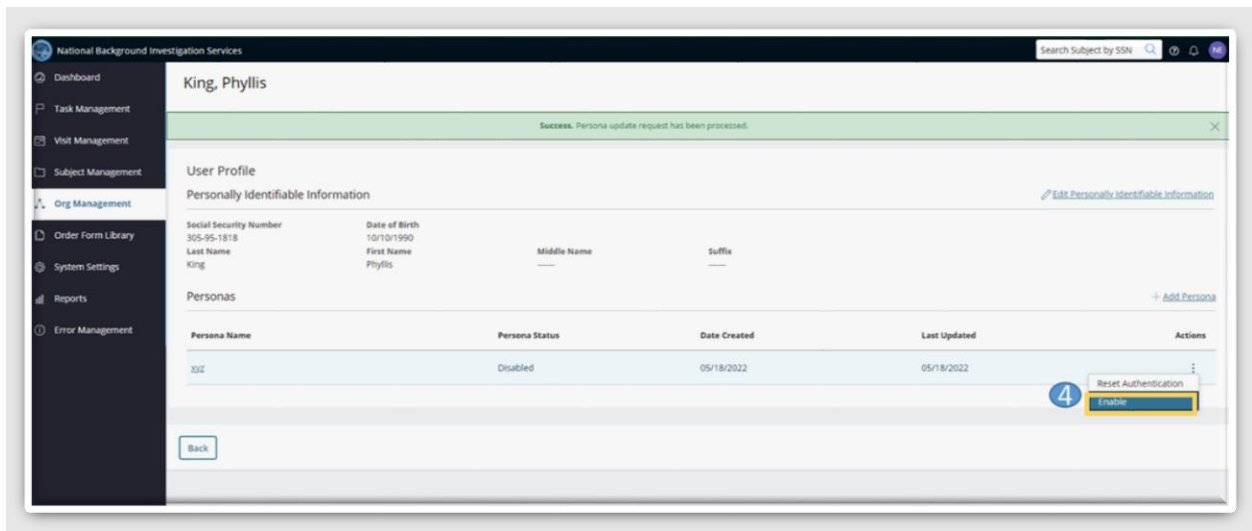
1

2

3

SSN (Last 4)	Last Name	First Name	Status	Organization	Team	Persona Name	Email	Actions
1011	User	User	Active	Parent Org		Test	Email@mail.mil	
1202	User	User	Active	Parent Org		cohort4parent	Email@mail.mil	
1202	User	User	Active	Parent Org		dc3a	Email@mail.mil	
4503	User	User	Active	Parent Org		OT	Email@mail.mil	
6668	User	User	Active	Parent Org		OT	Email@mail.mil	
5454	User	User	Active	Parent Org		OT	Email@mail.mil	
1818	King	Phyllis	Active	Parent Org		xyz	normal@mail.mil	

Step 4



4

Reset Authentication

Enable

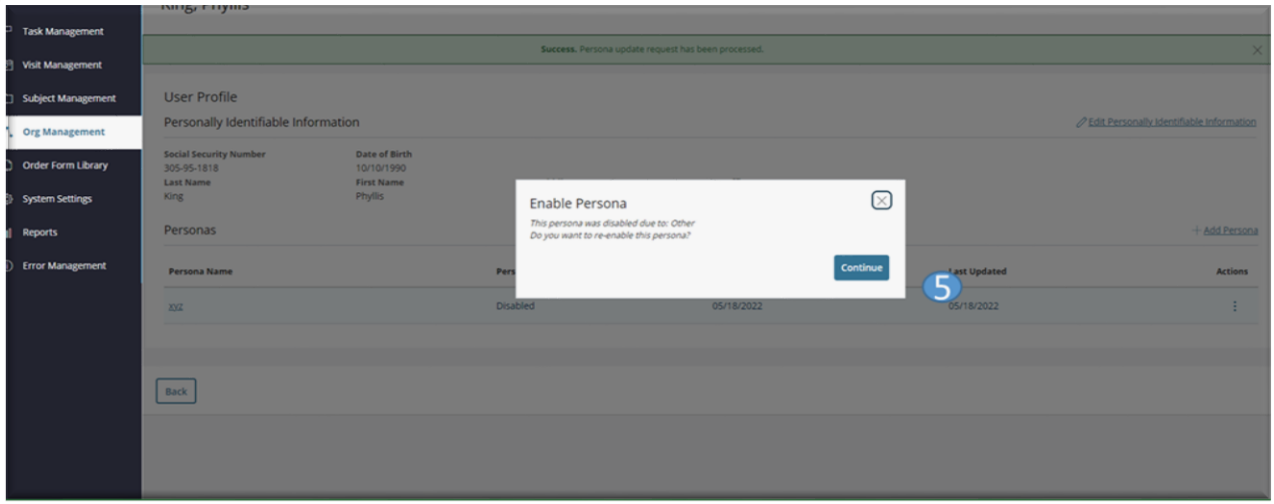
Persona Name	Persona Status	Date Created	Last Updated	Actions
xyz	Disabled	05/18/2022	05/18/2022	



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 5



The screenshot shows the 'Org Management' section of the Job Aid interface. A modal dialog box titled 'Enable Persona' is displayed in the center. The dialog contains the text: 'This persona was disabled due to: Other. Do you want to re-enable this persona?'. There is a 'Continue' button at the bottom right of the dialog. In the background, the 'User Profile' section is visible, showing 'Personally Identifiable Information' and a table of 'Personas'. A blue circle with the number '5' is overlaid on the 'Last Updated' column of the 'Personas' table.

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

Success. Persona update request has been processed.

User Profile
Personally Identifiable Information [Edit Personally Identifiable Information](#)

Social Security Number: 305-95-1818
Date of Birth: 10/10/1990
Last Name: King
First Name: Phyllis

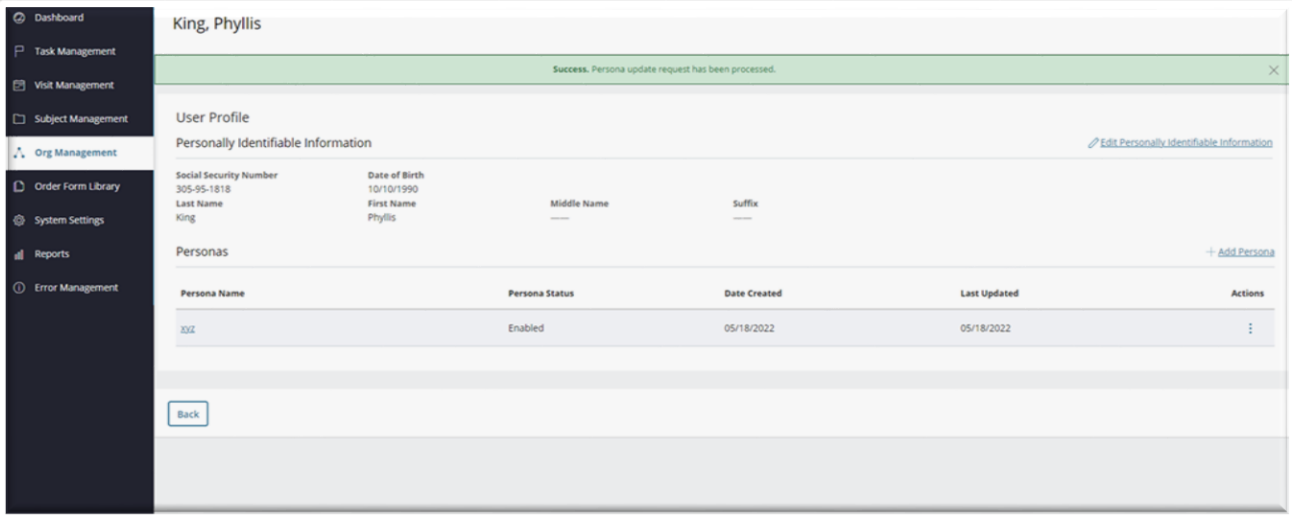
Personas

Persona Name	Persona Status	Date Created	Last Updated	Actions
XVZ	Disabled	05/18/2022	05/18/2022	

Back

Enable Persona
This persona was disabled due to: Other.
Do you want to re-enable this persona?
Continue

Step 5 Continued



The screenshot shows the 'User Profile' section of the Job Aid interface. The 'Enable Persona' dialog box is still present. The 'User Profile' section shows 'Personally Identifiable Information' and a table of 'Personas'. The 'Persona Status' column now shows 'Enabled' for the persona 'XVZ'. The 'Last Updated' column shows '05/18/2022'.

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

King, Phyllis

Success. Persona update request has been processed.

User Profile
Personally Identifiable Information [Edit Personally Identifiable Information](#)

Social Security Number: 305-95-1818
Date of Birth: 10/10/1990
Last Name: King
First Name: Phyllis
Middle Name: —
Suffix: —

Personas

Persona Name	Persona Status	Date Created	Last Updated	Actions
XVZ	Enabled	05/18/2022	05/18/2022	

Back



JOB AID

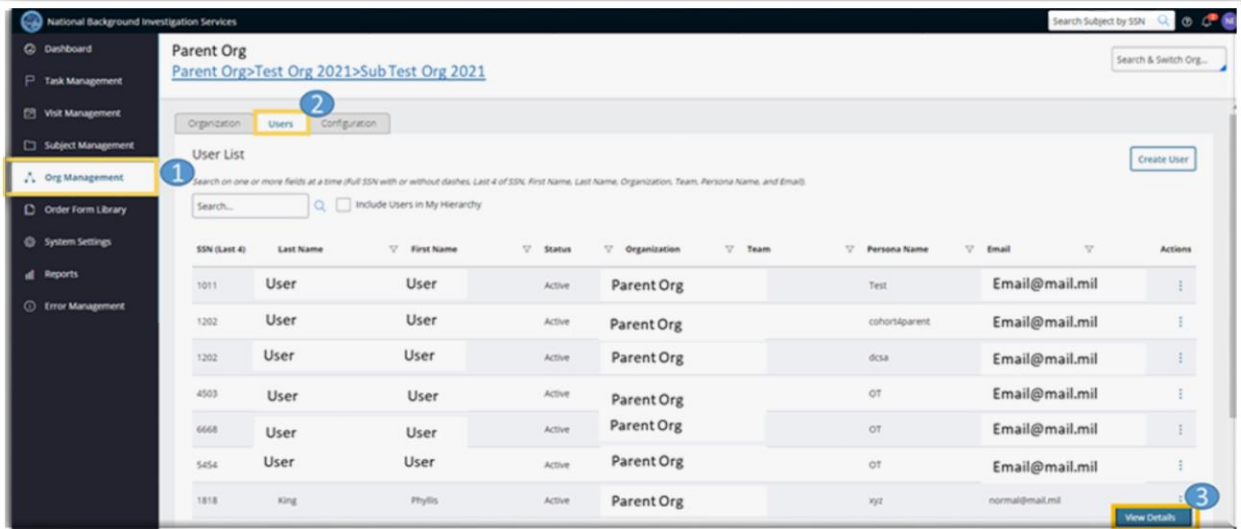
HOW TO RESET AN USER

Purpose and Overview: A user may experience difficulties logging into NBIS and may need to have their authentication reset in order to log back into the system. Users with the User Manager role can reset the authentication of a user within an organization's hierarchy. Once the below steps are completed, users will receive two separate emails containing a Persona ID and Enrollment Key to log back in. If the emails are sent to the users successfully, there will be a message indicating so. Otherwise, a failure message will appear.

Below outlines the 5-step process to reset a User:

1. Navigate to **Org Management** on the left-hand side and locate your organization (if needed).
2. Select the **Users tab** to view a list of users within the selected organization.
3. From the Actions column, select the **ellipses** icon next to the user row you wish to reset authentication. Select **View Details**.
4. Select **Reset Authentication**.
5. Select **Confirm** to reset the user's authentication.

Steps 1- 3



The screenshot displays the NBIS User List interface. The left sidebar shows the navigation menu with 'Org Management' highlighted. The main content area shows the 'Parent Org' hierarchy and the 'Users' tab selected. A table lists users with columns for SSN (Last 4), Last Name, First Name, Status, Organization, Team, Persona Name, Email, and Actions. The first user row is highlighted, and the 'View Details' button in the Actions column is circled. Numbered callouts 1, 2, and 3 indicate the steps: 1. Click 'Org Management' in the sidebar. 2. Click the 'Users' tab. 3. Click the 'View Details' button for a user.

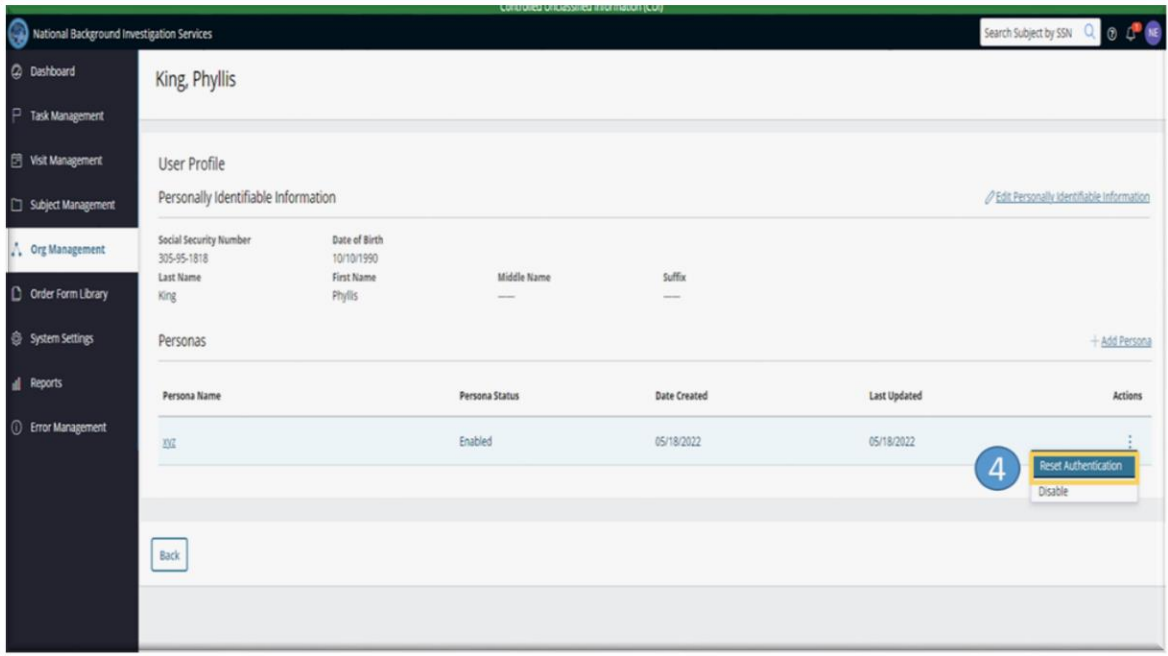
SSN (Last 4)	Last Name	First Name	Status	Organization	Team	Persona Name	Email	Actions
1011	User	User	Active	Parent Org		Test	Email@mail.mil	⋮
1202	User	User	Active	Parent Org		cohortparent	Email@mail.mil	⋮
1202	User	User	Active	Parent Org		dca	Email@mail.mil	⋮
4503	User	User	Active	Parent Org		OT	Email@mail.mil	⋮
6668	User	User	Active	Parent Org		OT	Email@mail.mil	⋮
5454	User	User	Active	Parent Org		OT	Email@mail.mil	⋮
1818	King	Phyllis	Active	Parent Org		xyz	normal@mail.mil	⋮



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 4



National Background Investigation Services

Search Subject by SSN

King, Phyllis

User Profile

Personally Identifiable Information [Edit Personally Identifiable Information](#)

Social Security Number: 305-95-1818 Date of Birth: 10/10/1990

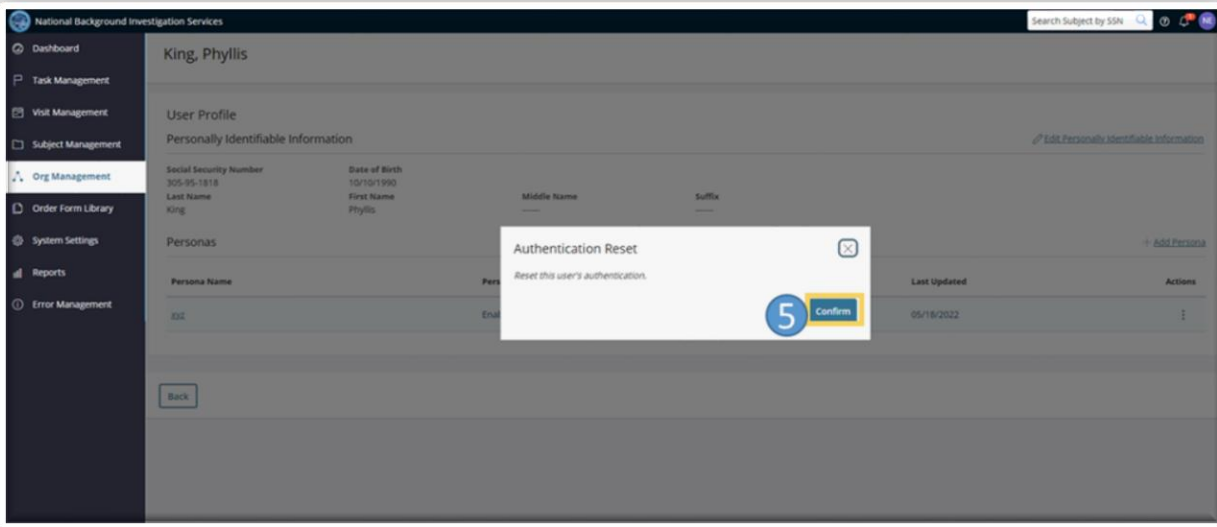
Last Name: King First Name: Phyllis Middle Name: — Suffix: —

Personas [+ Add Persona](#)

Persona Name	Persona Status	Date Created	Last Updated	Actions
ISI	Enabled	05/18/2022	05/18/2022	Reset Authentication Disable

[Back](#)

Step 5



National Background Investigation Services

Search Subject by SSN

King, Phyllis

User Profile

Personally Identifiable Information [Edit Personally Identifiable Information](#)

Social Security Number: 305-95-1818 Date of Birth: 10/10/1990

Last Name: King First Name: Phyllis Middle Name: — Suffix: —

Personas [+ Add Persona](#)

Persona Name	Persona Status	Date Created	Last Updated	Actions
ISI	Enabled	05/18/2022	05/18/2022	Reset Authentication Disable

[Back](#)

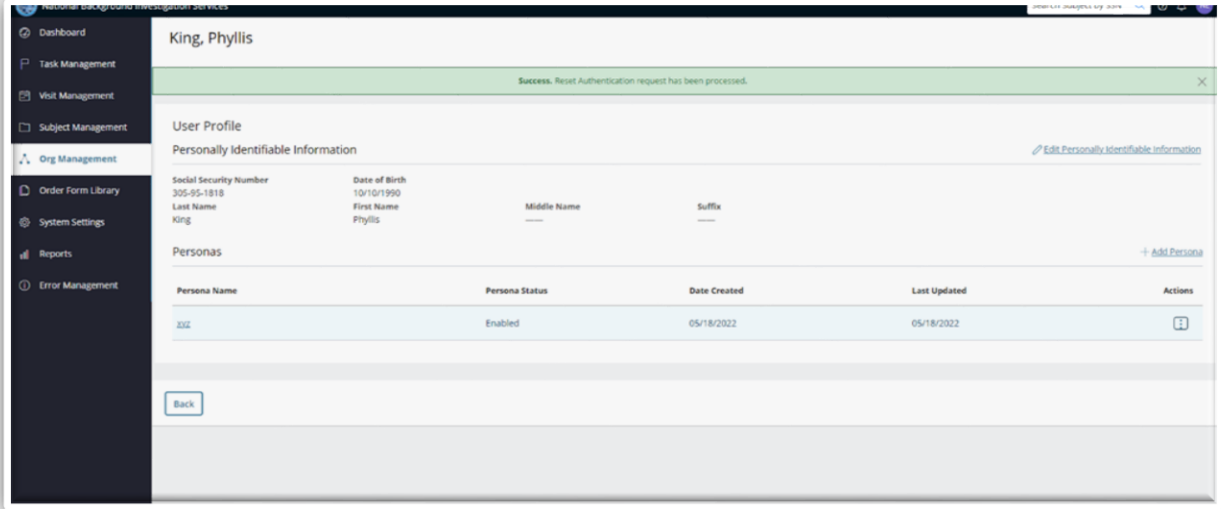
Authentication Reset

Reset this user's authentication.

[Confirm](#)



Step 5 Continued



King, Phyllis

Success. Reset Authentication request has been processed.

User Profile

Personally Identifiable Information [Edit Personally Identifiable Information](#)

Social Security Number	Date of Birth	Middle Name	Suffix
305-05-1818	10/10/1990	Phyllis	
Last Name	First Name		
King	Phyllis		

Personas [+ Add Persona](#)

Persona Name	Persona Status	Date Created	Last Updated	Actions
xxx	Enabled	05/18/2022	05/18/2022	i

[Back](#)

ORGANIZATION RELATIONSHIPS

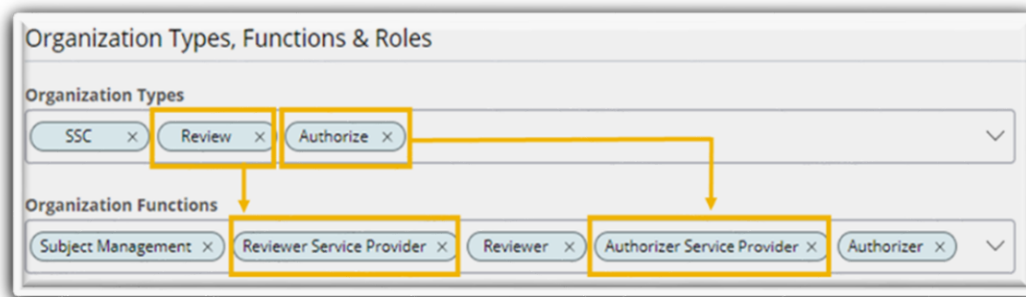
User Role Required: Org Relationship Manager. The Org Relationship Manager establishes and manages org relationships between their org and any orgs outside of their hierarchy as needed.

Purpose and Overview: Organization relationships within NBIS establish connections with organizations internally and externally to identify which organization will provide the Review & Authorization services for their org. Internal Relationships designate either your org or one of the sub-org, as the implementer responsible to carry out the Review and Authorization services. Once you have configured your Internal Relationships, then you can share your services out to other orgs. External Relationships establishes that connection between your org and those orgs outside your hierarchy structure that you wish to provide your Review and Authorization services. The Form Routing Workflow will determine the exact path each case will be sent for an org to carry out the Review and Authorization services. This is applied to each case upon initiation. More details on how to create and apply are in the [Form Routing Workflows](#) section.

The services your organization can provide are related to the Org Functions within your org, which is determined by your Org Type. In order for the user with the Org Relationship Manager role to edit your org's relationships, one of the "Provider" functions is needed. As a Service Provider org, you will be able to edit which org you provide services to and how you implement the Internal and External Relationships. Once Review and/or Authorize are chosen as the org type, then the Service Provider functions will appear allowing the org relationships to be created.



Example of Org Types and Functions with Provider Roles



HOW TO ADD/EDIT AN INTERNAL ORGANIZATION RELATIONSHIP

Purpose and Overview: Organizations should designate who they provide services to within their org's hierarchy and how their org's services will be implemented. Org Relationship Managers do so by adding Internal Organization Relationships.

Below outlines the 6-step process to create & edit Internal Org Relationships:

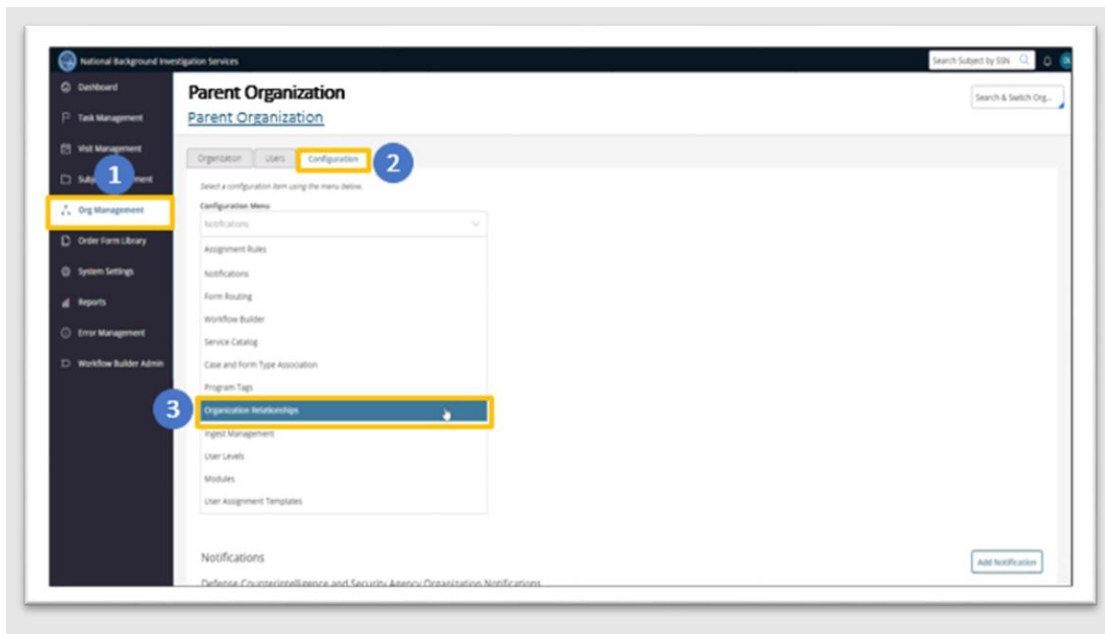
1. From log in, select **Org Management** from the Navigation menu.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
3. From the Configuration Menu, select **Organization Relationships**.
4. Within the Internal Relationship Management section, click the **Edit Relationships** hyperlink with the pencil icon.
5. Select the appropriate organization and/or sub-organization responsible for Review and Authorize services by typing the organization name and selecting it from the drop-down when it appears.
6. Click **Save** in the bottom right corner after making edits.



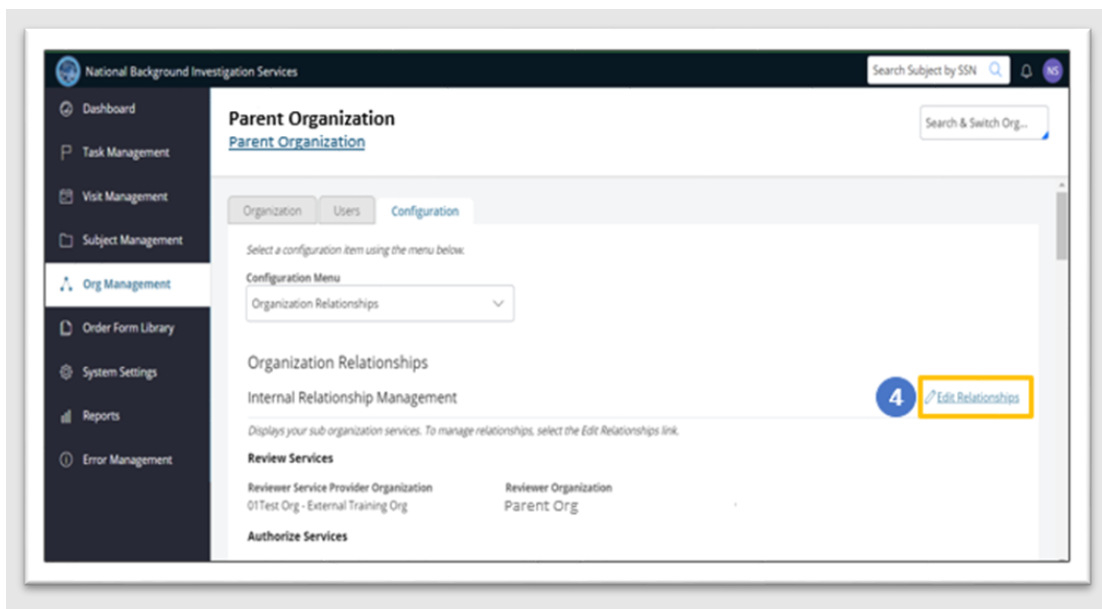
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1 – 3



Steps 4 – 5





DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

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

Parent Organization

[Parent Organization](#)

Search & Switch Org...

Organization Users Configuration

Select a configuration item using the menu below:

Configuration Menu
Organization Relationships

Organization Relationships

Internal Relationship Management

Manage the sub organizations that are currently a part of your organization that support a service type below.

Review Services

Reviewer Service Provider Organization*	Reviewer Organization
01	Parent Org
01Test Org - External Training Org	
01Test Org - External Training Org	Authorizer Organization
	01Test Org - External Training Org

Only Sub-Organizations that also have the corresponding Org Function, are selectable in this field item. This includes the Org that a user is signed into when editing Internal Org Relationships.

5

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

Parent Organization

[Parent Organization](#)

Search & Switch Org...

Review Services

Reviewer Service Provider Organization*	Reviewer Organization
01Test Org - External Training Org	Parent Org

Authorize Services

Authorizer Service Provider Organization*	Authorizer Organization

Cancel

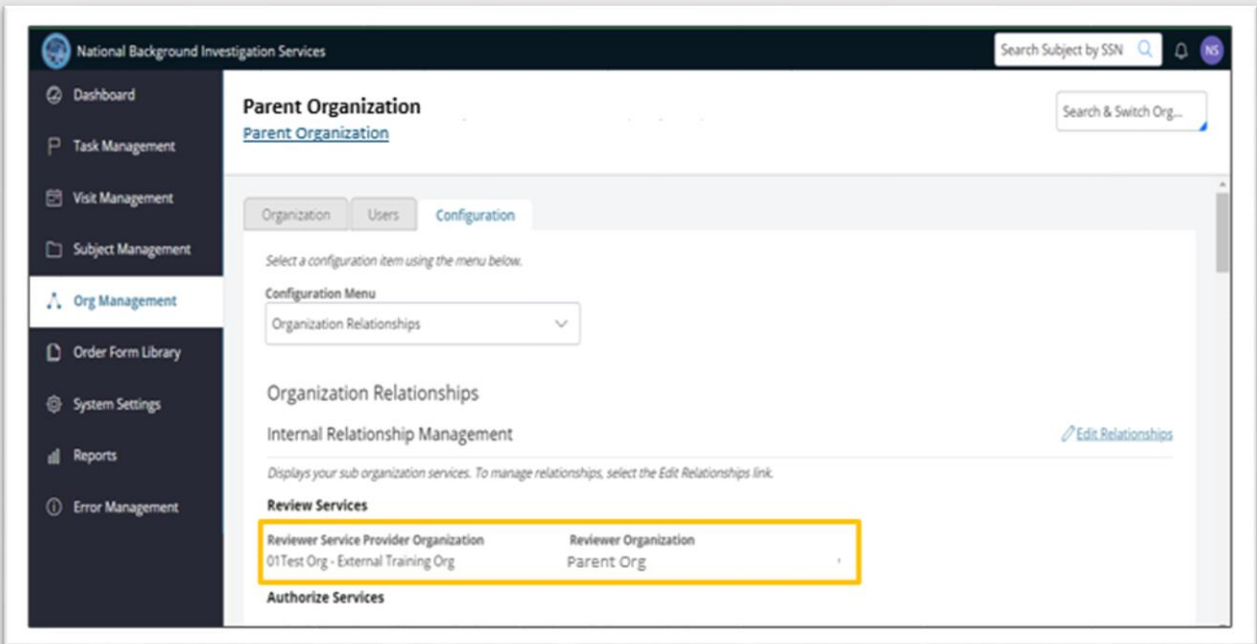
6 Save



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

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Step 6



The screenshot displays the 'National Background Investigation Services' web application. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management (highlighted), Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Parent Organization' and includes a 'Search Subject by SSN' bar and a 'Search & Switch Org...' button. Below the title, there are tabs for 'Organization', 'Users', and 'Configuration'. The 'Configuration' tab is active, showing a 'Configuration Menu' with a dropdown for 'Organization Relationships'. Below this, the 'Organization Relationships' section includes an 'Internal Relationship Management' link and a description: 'Displays your sub organization services. To manage relationships, select the Edit Relationships link.' The 'Review Services' section is highlighted with a yellow box and contains a table with two columns: 'Reviewer Service Provider Organization' and 'Reviewer Organization'. The table lists '01Test Org - External Training Org' and 'Parent Org' respectively. The 'Authorize Services' section is visible at the bottom.

Reviewer Service Provider Organization	Reviewer Organization
01Test Org - External Training Org	Parent Org



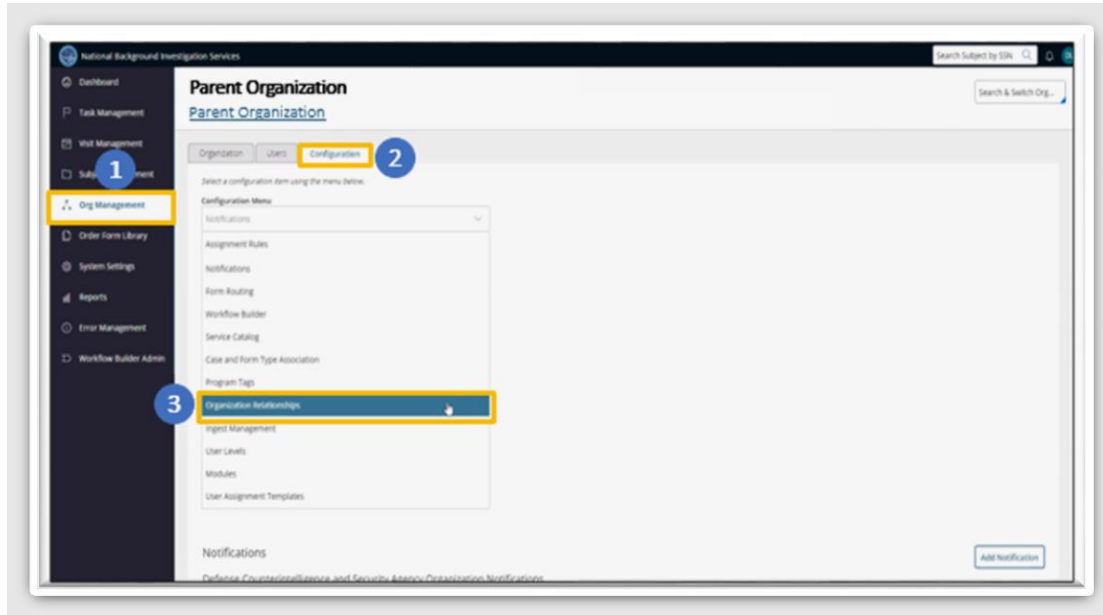
HOW TO ADD/EDIT AN EXTERNAL ORGANIZATION RELATIONSHIP

Purpose and Overview: Organizations should designate who they provide services to outside of their org's hierarchy and how their org's services will be implemented. Org Relationship Managers do so by adding External Organization Relationships after the Internal Relationships have been established.

Below outlines the 6-step process to create & edit External Org Relationships:

2. From log in, select **Org Management** from the Navigation menu.
3. Switch to the designated org (if needed) and select the **Configuration** tab.
4. From the Configuration Menu, select **Organization Relationships**.
5. Within the External Service Relationship Management section, click the **Edit Relationships** hyperlink with the pencil icon.
7. Select the appropriate organization(s) and/or sub-organization responsible for Review and Authorize services by typing the organization name and selecting it from the drop-down when it appears. More than one org may be added.
8. Click **Save** in the bottom right corner after making edits.

Steps 1- 3





DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

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Step 4

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Parent Org
[Parent Org > Test Org 2021 > Sub Test Org 2021](#)

Search & Switch Org...

4 Edit Relationships

External Service Relationship Management

Displays organizations that you provide your services to. To manage relationships, select the Edit Relationships link.

Review Services

Organizations that Share Review Services

NBIS

Authorize Services

Organizations that Share Authorize Services

NBIS

Adjudication Services

You must setup an internal Configuration before sharing this service.

Appeals Services

You must setup an internal Configuration before sharing this service.

Continuous Vetting Services

You must setup an internal Configuration before sharing this service.

Screening Services

You must setup an internal Configuration before sharing this service.

Services Received

Displays a list of the external organizations providing services related to your organization.

Step 5

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

Parent Org
[Parent Org > Test Org 2021 > Sub Test Org 2021](#)

Search & Switch Org...

5

Select a configuration item using the menu below.

Configuration Menu

Organization Relationships

Organization Relationships

External Service Relationship Management

Displays organizations that you provide your services to. Manage external organization relationships that share services with your organization below. Only top tiered organizations can be managed.

Review Services

Organizations that Share Review Services

NBIS

Authorize Services

Organizations that Share Authorize Services

NBIS



HOW TO VIEW EXTERNAL ORGANIZATION RELATIONSHIPS

Purpose and Overview: Org Relationship Managers can view services being offered to their org by external service providers.

The “Services Received” table displays the services being offered to your org by external service providers. This was configured in the providing org’s External Service Relationship Management section when adding/editing an External Relationship. In the example below, the Defense Counterintelligence and Security Agency is offering both Review and Authorization Services to the designated org. The Security Office HQ org is providing Authorization Services. The Form Routing Workflow will determine the path each case will take and is applied upon initiating a case. See Form Routing Workflows section for more information.

Services Received	
Displays a list of the external organizations providing services related to your organization.	
Review Services	
Servicing Organization	Servicing Organization Path
Defense Counterintelligence and Security Agency	/NBIS/FED/EXEC/CAB/DOD/4E/DCSA/
Authorize Services	
Servicing Organization	Servicing Organization Path
Defense Counterintelligence and Security Agency	/NBIS/FED/EXEC/CAB/DOD/4E/DCSA/
Security Office HQ	/NBIS/FED/EXEC/DEP/DOD/4THESSTATE/DCSA/SOHQ/



FORM ROUTING WORKFLOWS

User Role Required: Workflow Manager. The Workflow Manager can create, modify, or disable a workflow.

Purpose and Overview: A Form Routing Workflows identifies the org(s) that will provide the Review and Authorization services and allows for the initiator to quickly select the appropriate routing path for each investigation.

Form Routing Workflows are a **mandatory** configuration. Form Routing Workflows determine which organizations will perform the review and authorization phases and automate where Standard Forms (e.g. SF85, SF85p and SF86) are routed after initiation. Workflows must be established before a case can be initiated.

HOW TO VIEW/ADD FORM ROUTING WORKFLOWS

Purpose and Overview: Workflow managers can view and edit Form Routing Workflows.

Below is the 7-step process for viewing, editing, enabling, and disabling Form Routing Workflows:

1. Select **Org Management** from the Navigation Menu on the left side of the screen.
2. Switch to the designated org (if needed) and select the **Configuration tab**.
3. From the Configuration Menu, select **Form Routing**.
 - a. Any existing Form Routing Workflow(s) will be listed and will indicate which org is the Initiator, Reviewer and/or Authorizer. It will also show the status as either Enabled or Disabled. To view the details of a specific Form Routing Workflow, click the **hyperlink** in the Form Routing Name column.
 - b. To add a new Form Route, select **Add Form Route** from the Actions drop-down menu.
4. Complete all required fields starting with entering a Form Routing Name. Be sure to include a name that identifies the path of the Workflow as only the name is displayed and applied upon case initiation. No details on the Workflow path will be included. Orgs can have multiple Form Routing Workflows. For example; if an org named "Security Office" will be doing both the Review and Authorization, then include the name as "Security Office will Rev. and Auth" The org establishing/editing the Form Routing Workflow is considered to be the initiating org. The Form Routing Workflow will establish the Review & Authorization orgs for that initiating org.
5. Select a **Reviewer Organization** category and an **Authorizer Organization** category.
 - o Users can select Hierarchy for internal relationships. User should choose their org or another sub-org within their hierarchy to provide Reviewer and Authorizer functionality.
 - o Users can select Org Relationship to permit an external Org outside of their Org hierarchy to provide Reviewer and/or Authorizer functionalities. External means any org above or parallel to your org. Note that Organizations must have already established an external organization relationship in order to appear in this selection.

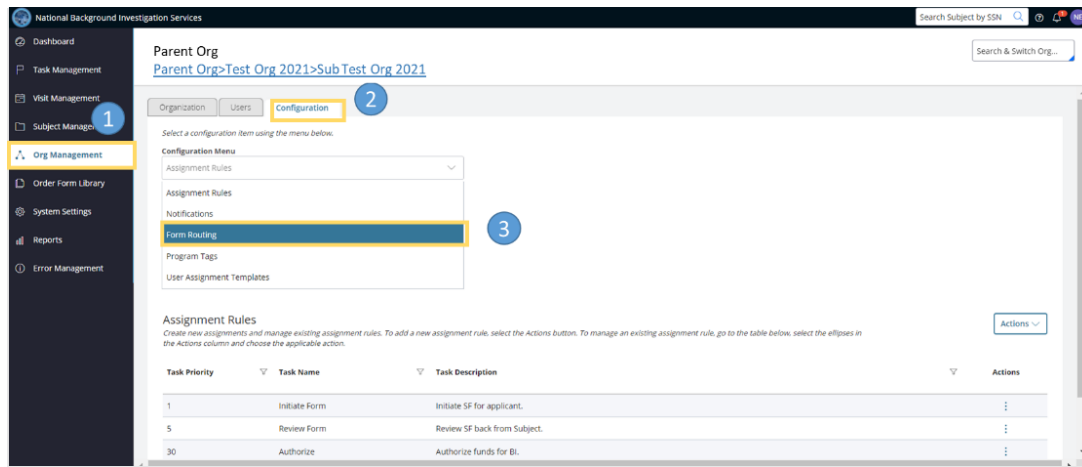


DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

6. Within the fields for Reviewer Organization and Authorizer Organization, start typing in an organization's name to make them Reviewer and/or Authorizer Organizations. Enter the [External Destination ISP Name](#) (if needed).
7. Once required fields are completed, select [Submit](#) to save the new workflow.
 - a. **Note:** After saving, the newly created workflow should appear in the list of existing workflows. If the workflow does not appear, locate the workflow in the Form Routing Associations section and select the hyperlink under the Association name column. On the next screen, ensure the status of the workflow is set to Enabled and [Save](#).

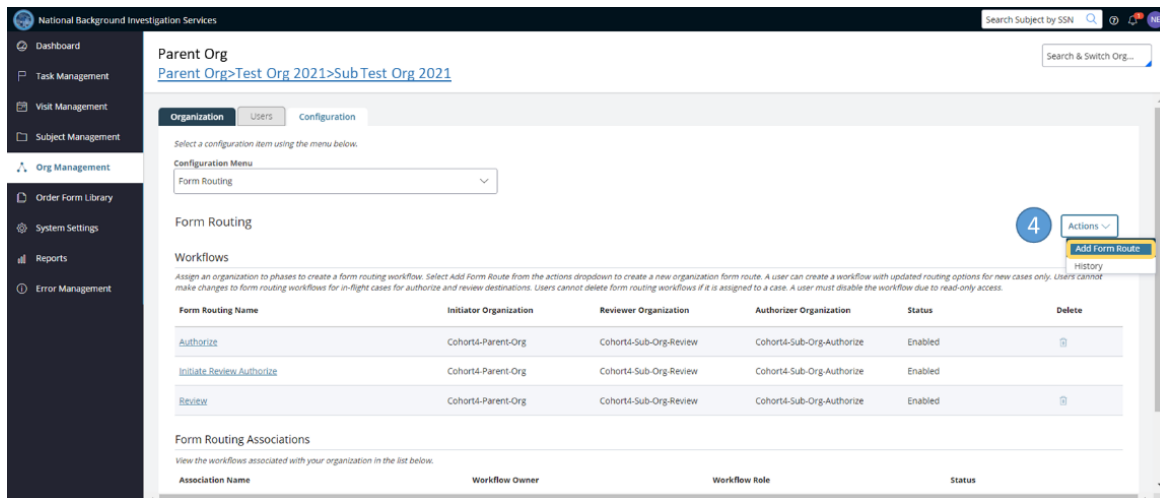
Steps 1-3





The screenshot shows the NBIS interface with the 'Parent Org' dropdown set to 'Parent Org>Test Org 2021>Sub Test Org 2021'. The 'Configuration' tab is selected, and the 'Form Routing' option is highlighted in the configuration menu. The 'Assignment Rules' table is visible below.

Task Priority	Task Name	Task Description	Actions
1	Initiate Form	Initiate SF for applicant.	⋮
5	Review Form	Review SF back from Subject.	⋮
30	Authorize	Authorize funds for BI.	⋮

Step 4



The screenshot shows the 'Form Routing' section with the 'Workflows' table. The 'Add Form Route' button is highlighted in the 'Actions' dropdown menu.

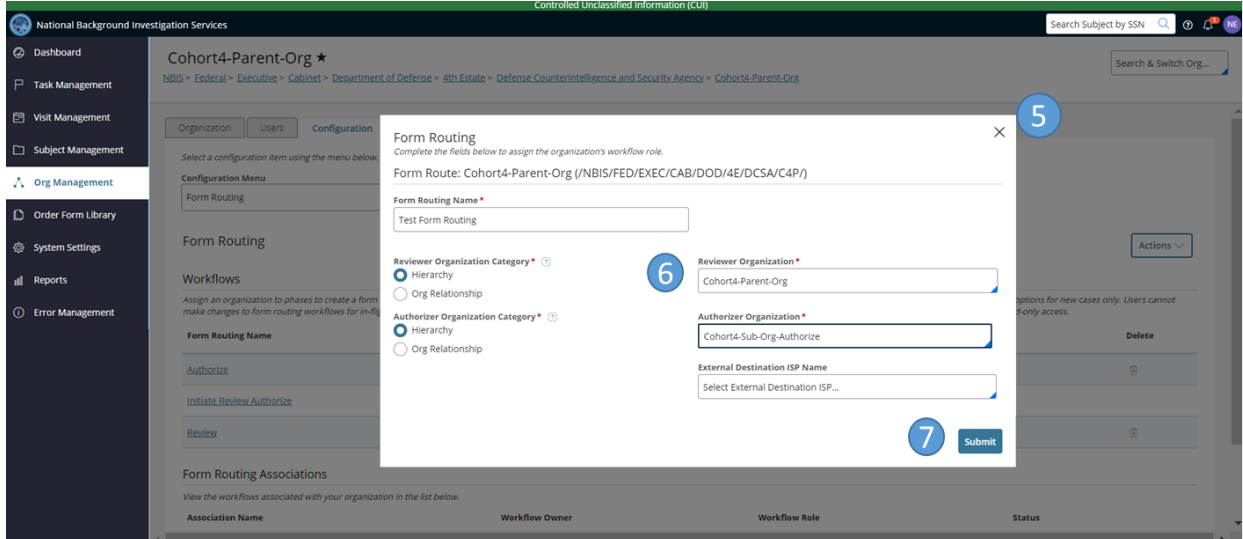
Form Routing Name	Initiator Organization	Reviewer Organization	Authorizer Organization	Status	Delete
Authorize	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	
Initiate Review Authorize	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	
Review	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	

Form Routing Associations
View the workflows associated with your organization in the list below.

Association Name	Workflow Owner	Workflow Role	Status
------------------	----------------	---------------	--------



Step 5- 7



HOW TO EDIT AND ENABLE/DISABLE FORM ROUTING WORKFLOWS

Purpose and Overview: Workflow Managers can edit Form Routing Workflows. A workflow may be edited when there is a change in the org performing the review and/or authorize function. Changes cannot be made to the workflow for cases that are in-flight for the review and authorize destinations.

Below is the 5-step process for editing, enabling, and disabling Form Routing Workflows:

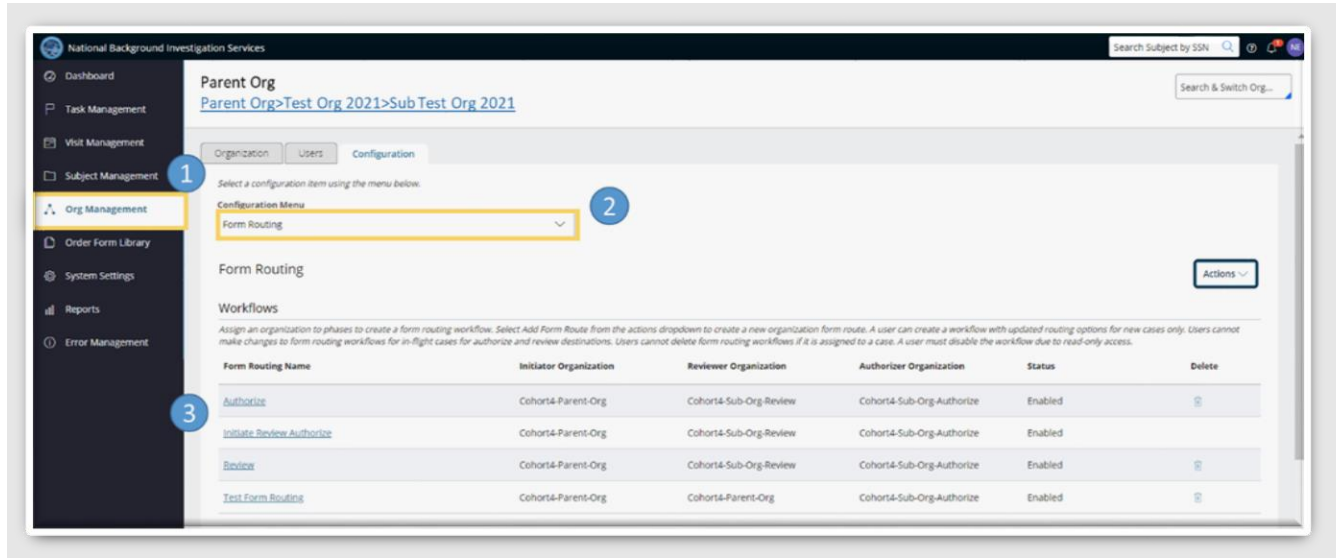
1. Select **Org Management** from the Navigation Menu on the left side of the screen.
2. Switch to the designated org (if needed) and select the **Configuration tab**.
3. From the Configuration Menu, select **Form Routing**. The Form Routing Workflows will be listed and will indicate which org is the Initiator, Reviewer and/or Authorizer. It will also show the status as either Enabled or Disabled. To view the details of a specific Form Routing Workflow, click the **hyperlink** in the Form Routing Name column.
4. Users can make modifications only if the Form Routing Workflow has not been used. If there are cases in-flight that have used or are using the Form Routing Workflow, then users can only edit the Form Routing Name or edit the status to **Enabled/Disabled**.
 - a. **Note:** Users may want to enable a Form Routing Workflow to make sure that they will be able to utilize the routing option for their org. Users may want to disable a Form Routing Workflow if the route needs to be temporarily made unavailable for case routing.
5. After making edits, select **Submit** to complete the updates.



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Steps 1-3



Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration





Select a configuration item using the menu below.

Configuration Menu
Form Routing

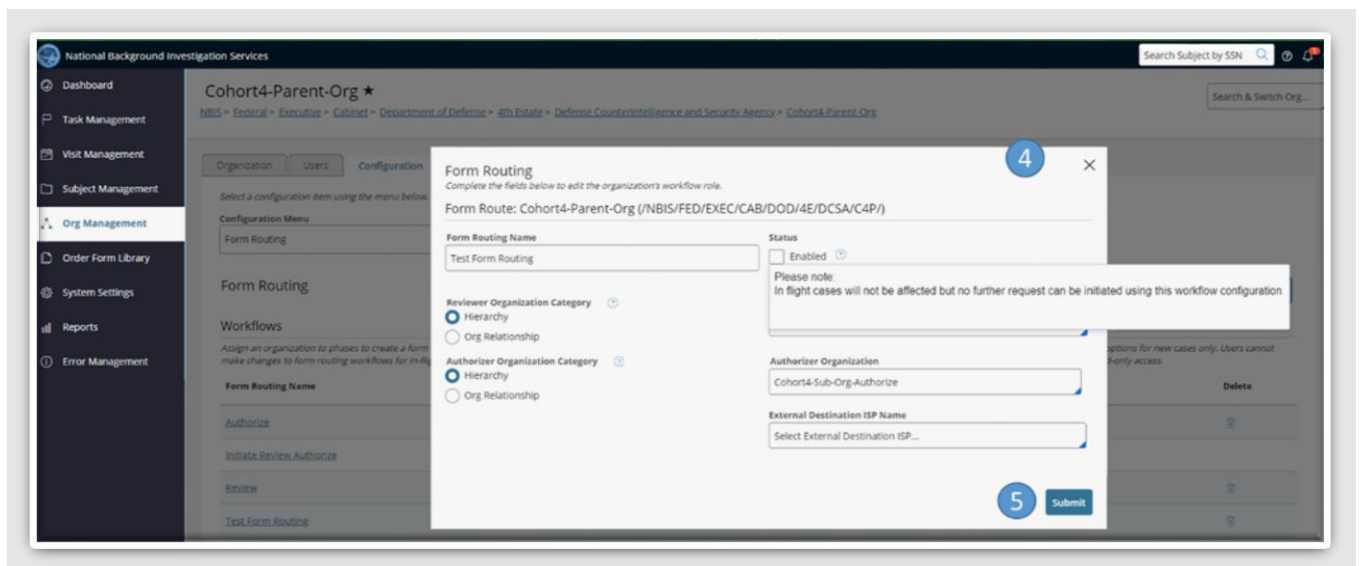
Form Routing

Workflows

Assign an organization to phases to create a form routing workflow. Select Add Form Route from the actions dropdown to create a new organization form route. A user can create a workflow with updated routing options for new cases only. Users cannot make changes to form routing workflows for in-flight cases for authorize and review destinations. Users cannot delete form routing workflows if it is assigned to a case. A user must disable the workflow due to read-only access.

Form Routing Name	Initiator Organization	Reviewer Organization	Authorizer Organization	Status	Delete
Authorize	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	
Initiate Review Authorize	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	
Review	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	
Test Form Routing	Cohort4-Parent-Org	Cohort4-Parent-Org	Cohort4-Sub-Org-Authorize	Enabled	

Step 4- 5



Cohort4-Parent-Org ★
[NBIS](#) > [Federal](#) > [Executive](#) > [Cabinet](#) > [Department of Defense](#) > [4th Estate](#) > [Defense Counterintelligence and Security Agency](#) > [Cohort4-Parent-Org](#)

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu
Form Routing

Form Routing

Workflows

Assign an organization to phases to create a form routing workflow. Select Add Form Route from the actions dropdown to create a new organization form route. A user can create a workflow with updated routing options for new cases only. Users cannot make changes to form routing workflows for in-flight cases for authorize and review destinations. Users cannot delete form routing workflows if it is assigned to a case. A user must disable the workflow due to read-only access.

Form Routing

Complete the fields below to edit the organization's workflow role.

Form Route: Cohort4-Parent-Org (/NBIS/FED/EXEC/CAB/DOD/4E/DCSA/C4P/)

Form Routing Name
Test Form Routing

Status
☐ Enabled

Please note:
In flight cases will not be affected but no further request can be initiated using this workflow configuration

Reviewer Organization Category
☒ Hierarchy
☐ Org Relationship

Authorizer Organization Category
☒ Hierarchy
☐ Org Relationship

Authorizer Organization
Cohort4-Sub-Org-Authorize

External Destination ISP Name
Select External Destination ISP...

Submit



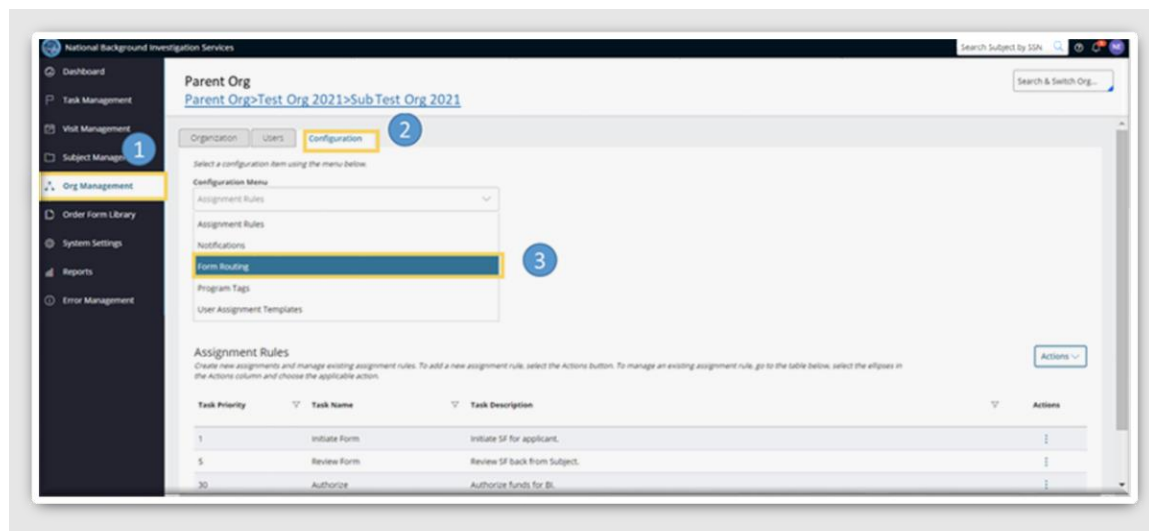
HOW TO DELETE FORM ROUTING WORKFLOWS

Purpose and Overview: Users may want to delete a Form Routing Workflow if the routing option is no longer applicable to org/cases within their org. Users can view the history of a Form Routing Workflow by clicking the Actions button in the upper right-hand corner and selecting “History.”

Below is the 6-step process for deleting Form Routing Workflows:

1. Select **Org Management** from the Navigation Menu on the left side of the screen.
2. Switch to the designated Org (if needed) and select the **Configuration tab**.
4. From the Configuration Menu, select **Form Routing**.
5. Once all existing Form Routing Workflows are displayed, find the row for the specific Form Routing Workflow being deleted.
5. Select the **trashcan icon** under the Delete column to delete the Form Routing Workflow.
 - a. **Note:** A Form Routing Workflow cannot be deleted if it is currently being utilized by cases in flight. The trashcan icon will not be visible.
6. Select **Continue** to confirm the deletion request. The Form Routing Workflow will not appear on a user’s list of existing Form Routing Workflows anymore.

Steps 1-3

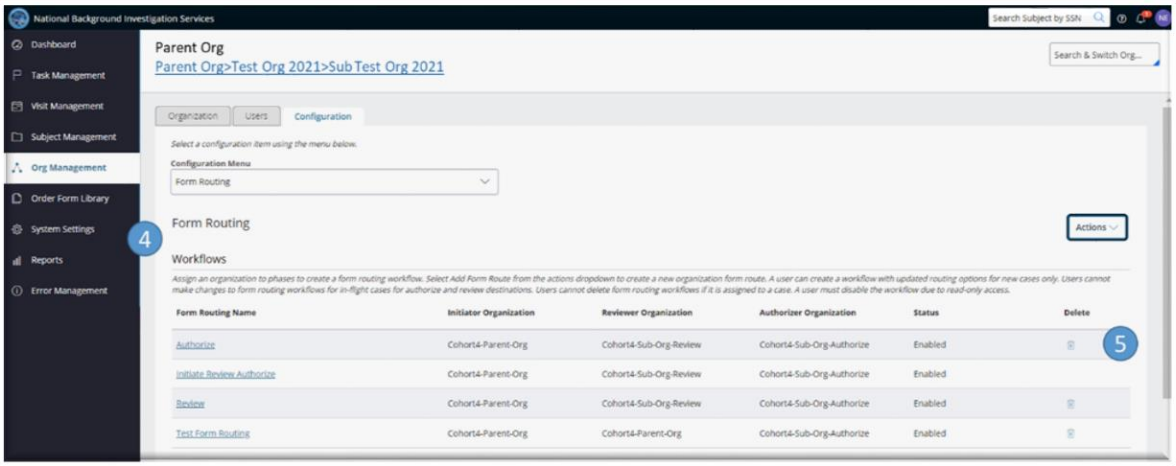








DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

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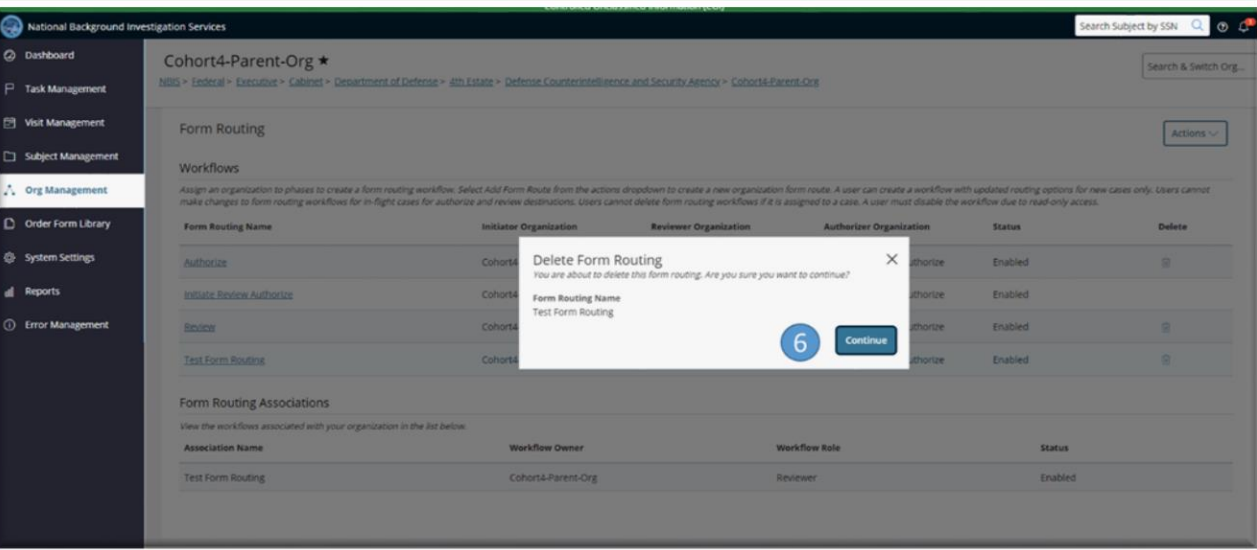
Steps 4- 5







The screenshot shows the 'Form Routing' configuration page in the NBIS system. The page is titled 'Parent Org' and 'Parent Org>Test Org 2021>Sub Test Org 2021'. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management (highlighted), Order Form Library, System Settings, Reports, and Error Management. The main content area has tabs for 'Organization', 'Users', and 'Configuration'. Under 'Configuration', there is a 'Form Routing' dropdown menu. Below this, a 'Form Routing' section contains a 'Workflows' table. The table has columns: Form Routing Name, Initiator Organization, Reviewer Organization, Authorizer Organization, Status, and Delete. The table lists four workflows: 'Authorize', 'Initiate Review Authorize', 'Review', and 'Test Form Routing'. A blue circle with the number '4' is placed over the 'Form Routing' section, and a blue circle with the number '5' is placed over the 'Delete' column of the 'Test Form Routing' row.

Form Routing Name	Initiator Organization	Reviewer Organization	Authorizer Organization	Status	Delete
Authorize	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	
Initiate Review Authorize	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	
Review	Cohort4-Parent-Org	Cohort4-Sub-Org-Review	Cohort4-Sub-Org-Authorize	Enabled	
Test Form Routing	Cohort4-Parent-Org	Cohort4-Parent-Org	Cohort4-Sub-Org-Authorize	Enabled	

Step 6



The screenshot shows the 'Form Routing' configuration page in the NBIS system for 'Cohort4-Parent-Org'. The page is titled 'Cohort4-Parent-Org' and 'NBIS > Federal > Executive > Cabinet > Department of Defense > 4th Estate > Defense Counterintelligence and Security Agency > Cohort4-Parent-Org'. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management (highlighted), Order Form Library, System Settings, Reports, and Error Management. The main content area has tabs for 'Form Routing' and 'Users'. Under 'Form Routing', there is a 'Workflows' section. The 'Workflows' section contains a table with columns: Form Routing Name, Initiator Organization, Reviewer Organization, Authorizer Organization, Status, and Delete. The table lists four workflows: 'Authorize', 'Initiate Review Authorize', 'Review', and 'Test Form Routing'. A blue circle with the number '6' is placed over the 'Delete' column of the 'Test Form Routing' row. A dialog box titled 'Delete Form Routing' is open, asking 'You are about to delete this form routing. Are you sure you want to continue?'. The dialog box has a 'Continue' button. Below the 'Workflows' section, there is a 'Form Routing Associations' section. The 'Form Routing Associations' section contains a table with columns: Association Name, Workflow Owner, Workflow Role, and Status. The table lists one association: 'Test Form Routing' with 'Cohort4-Parent-Org' as the Workflow Owner, 'Reviewer' as the Workflow Role, and 'Enabled' as the Status.

Form Routing Name	Initiator Organization	Reviewer Organization	Authorizer Organization	Status	Delete
Authorize	Cohort4	Cohort4	Cohort4	Enabled	
Initiate Review Authorize	Cohort4	Cohort4	Cohort4	Enabled	
Review	Cohort4	Cohort4	Cohort4	Enabled	
Test Form Routing	Cohort4	Cohort4	Cohort4	Enabled	

Association Name	Workflow Owner	Workflow Role	Status
Test Form Routing	Cohort4-Parent-Org	Reviewer	Enabled



PROGRAM TAGS

User Role Required: Program Tag Manager. The Program Tag Manager has the capability to create and manage program tags for their organizations(s).

Purpose and Overview: Program tags can be used to label and prioritize cases, restrict where they appear, or who can view them. Program tags are created at the organization level and can be applied to subject and user profiles.

Program Tags are an **optional** configuration. When restrictions are placed on Program Tags, they can affect User Assignments and Assignment Rules because they designate specialized categories of cases that only select users can work on. When creating Program Tags, be sure to take the organization's assignment rules into consideration.

HOW TO VIEW PROGRAM TAGS

Purpose and Overview: Program Tag Managers can view and edit their org's Program Tags, view other org's Program Tags, and use/request use of the other org's Program Tags.

Below outlines the 5-step process for viewing Program Tags:

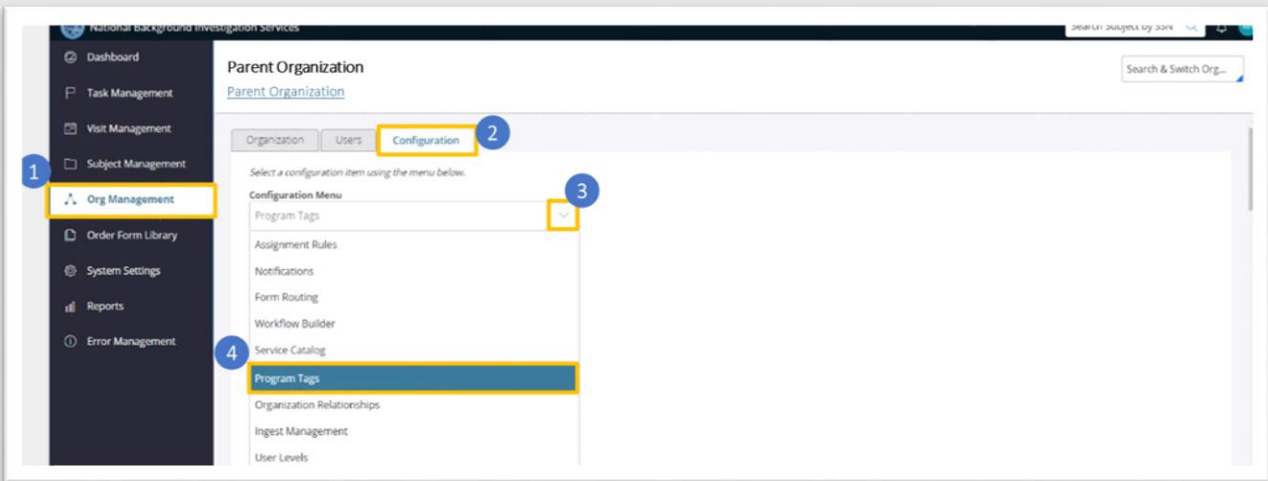
1. From initial log in, select **Org Management** on the left from the Navigation Menu.
2. Users can navigate to their organization (if needed). Select the **Configuration** tab.
3. From the Configuration Menu drop-down, select **Program Tags**.
4. Users will be presented with the list of existing Program Tags for user's organization and a full Program Tag Library for Program Tags created by other orgs available for potential use by user's org.
 - a. The Program Tag library will display Program Tag Name, Program Tag Abbreviations, Program Tag Visibility (whether Protected or Public) along with an actions drop-down for modifications.
5. To view the details of a Program Tag, click on the Program Tag name (hyperlink).



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Steps 1- 4



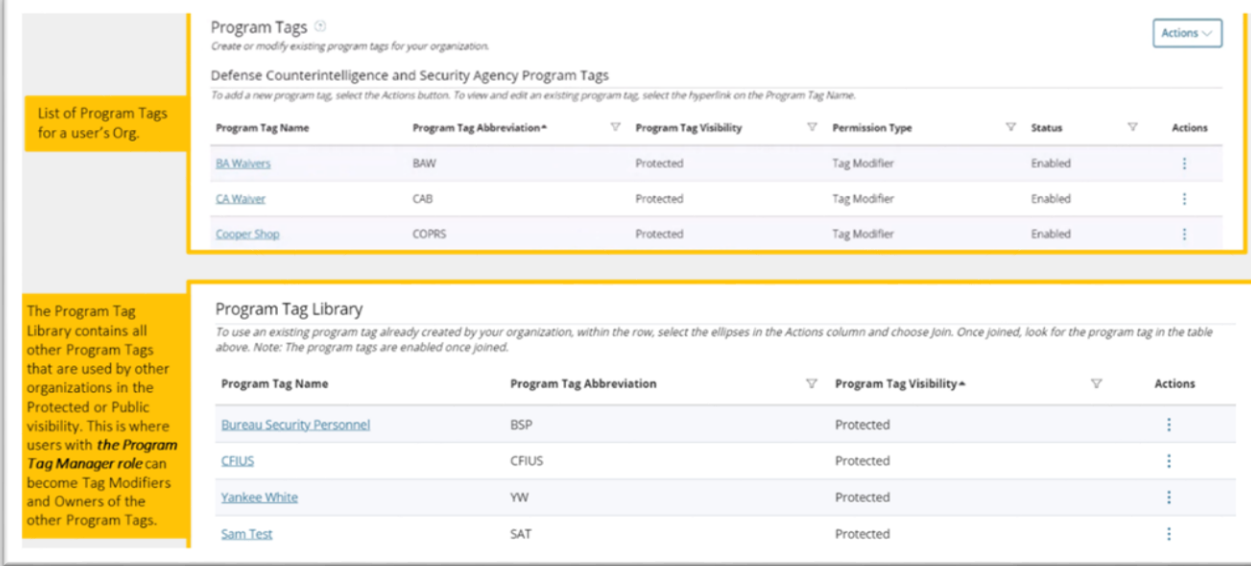
1. Click on **Org Management** in the left sidebar.

2. Click on the **Configuration** tab.

3. Click on the **Program Tags** link in the Configuration Menu.

4. The **Program Tags** page is displayed.

Step 5



List of Program Tags for a user's Org.

Program Tags
Create or modify existing program tags for your organization.

Defense Counterintelligence and Security Agency Program Tags
To add a new program tag, select the Actions button. To view and edit an existing program tag, select the hyperlink on the Program Tag Name.

Program Tag Name	Program Tag Abbreviation	Program Tag Visibility	Permission Type	Status	Actions
BA Waivers	BAW	Protected	Tag Modifier	Enabled	⋮
CA Waiver	CAB	Protected	Tag Modifier	Enabled	⋮
Cooper Shop	COPRS	Protected	Tag Modifier	Enabled	⋮

The Program Tag Library contains all other Program Tags that are used by other organizations in the Protected or Public visibility. This is where users with the *Program Tag Manager* role can become Tag Modifiers and Owners of the other Program Tags.

Program Tag Library
To use an existing program tag already created by your organization, within the row, select the ellipses in the Actions column and choose join. Once joined, look for the program tag in the table above. Note: The program tags are enabled once joined.

Program Tag Name	Program Tag Abbreviation	Program Tag Visibility	Actions
Bureau Security Personnel	BSP	Protected	⋮
CFIUS	CFIUS	Protected	⋮
Yankee White	YW	Protected	⋮
Sam Test	SAT	Protected	⋮



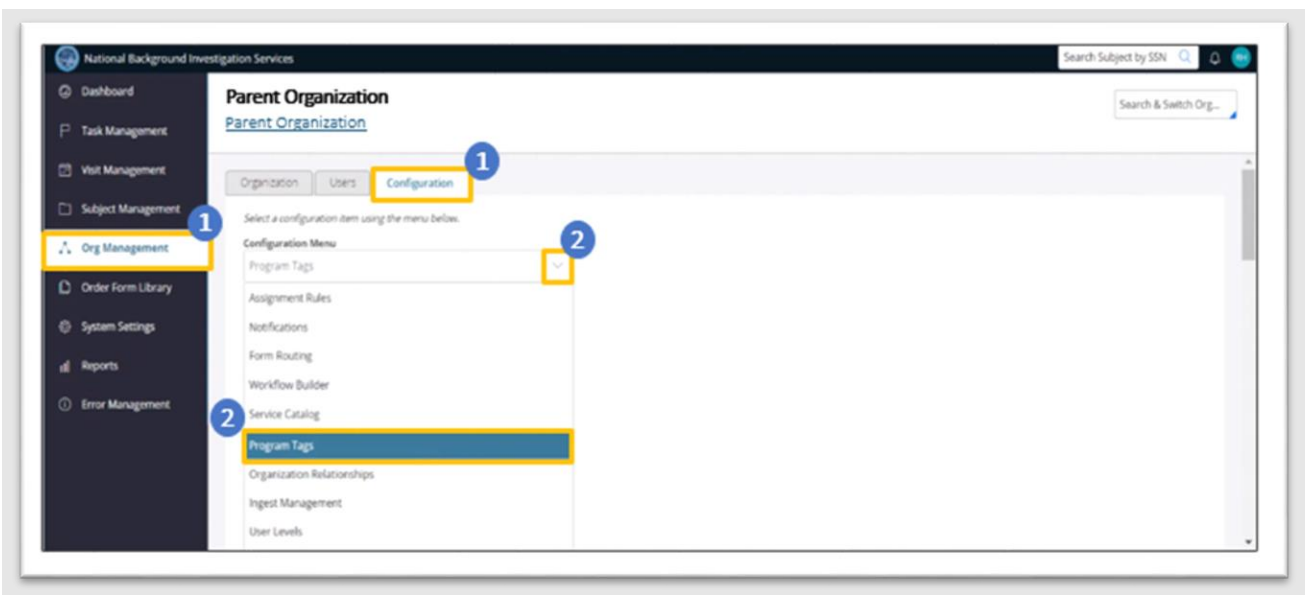
HOW TO ADD PROGRAM TAGS

Purpose and Overview: Program Tag Managers can add Program Tags to the org and apply those tags to subjects in order to identify subjects with certain attributes (i.e. high or low priority).

Below outlines the 4-step process for how to add a Program Tag:

1. From log in, select **Org Management** from the Navigation Menu on the left. Switch to the designated org (if needed) and select the Configuration tab.
2. From the Configuration Menu, select **Program Tags**.
3. Click the arrow within the Actions button to reveal the Actions drop-down menu. Select **Add Tag** to create a new Program Tag.
4. Complete all required fields and any desired optional fields for the Program Tag. Click **Save and Add** when finished. The newly added Program Tag should now appear in the list of existing Program Tags.

Steps 1 - 2

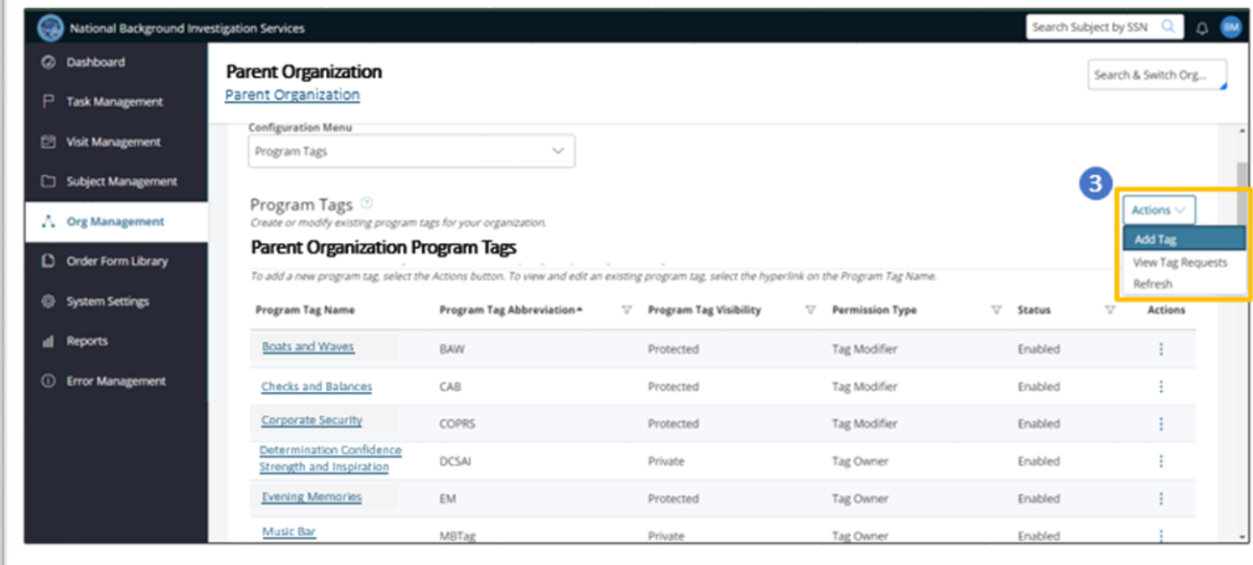




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Step 3



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

Parent Organization
[Parent Organization](#)

Configuration Menu
Program Tags

Program Tags
Create or modify existing program tags for your organization.

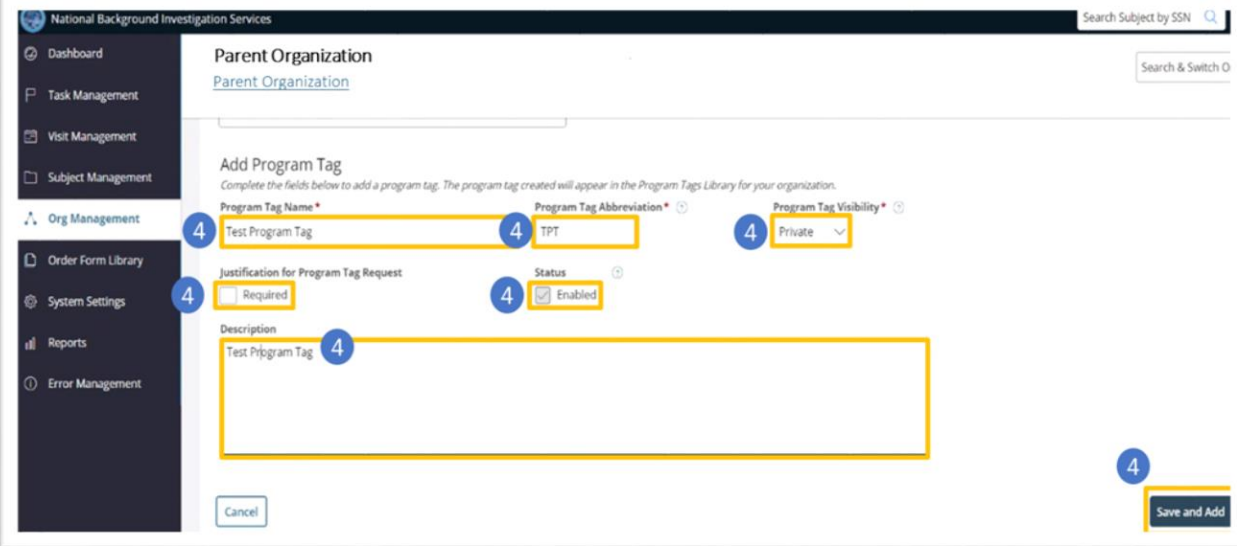
Parent Organization Program Tags
To add a new program tag, select the Actions button. To view and edit an existing program tag, select the hyperlink on the Program Tag Name.

Program Tag Name	Program Tag Abbreviation*	Program Tag Visibility	Permission Type	Status	Actions
Boats and Waves	BAW	Protected	Tag Modifier	Enabled	⋮
Checks and Balances	CAB	Protected	Tag Modifier	Enabled	⋮
Corporate Security	COPRS	Protected	Tag Modifier	Enabled	⋮
Determination Confidence Strength and Inspiration	DCSAI	Private	Tag Owner	Enabled	⋮
Evening Memories	EM	Protected	Tag Owner	Enabled	⋮
Music Bar	MBTag	Private	Tag Owner	Enabled	⋮

3

Actions
Add Tag
View Tag Requests
Refresh

Step 4



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

Parent Organization
[Parent Organization](#)

Add Program Tag
Complete the fields below to add a program tag. The program tag created will appear in the Program Tags Library for your organization.

Program Tag Name* 4 Test Program Tag 4 TPT 4 Private

Program Tag Abbreviation* 4 TPT

Program Tag Visibility* 4 Private

Justification for Program Tag Request 4 Required 4 Enabled

Status 4 Enabled

Description 4 Test Program Tag

4

Cancel

Save and Add



HOW TO EDIT/DISABLE PROGRAM TAGS

Purpose and Overview: Program Tags may be modified according to need. Program tags may also be disabled if they are no longer required or in use by the organization. Only users with the Program Tag Manager role can disable Program Tags. Program Tags can only be disabled if Program Tag Managers are the only user with access to the Program Tag. Program Tags cannot be deleted.

Below outlines the 5-step process for editing Program Tags:

1. From log in, select **Org Management** from the Navigation Menu on the left. Switch to the designated org (if needed) and select the Configuration tab.
2. From the Configuration Menu, select **Program Tags**.
3. In the "Program Tag Name" column, click the hyperlinked text on the row of the Program Tag that user would like to edit or manage.
4. On the right side of the page, click the **Edit Details** hyperlink to edit any of the required or optional fields for the Program Tag information. **Select Save**.
 - a. Repeat Step 3, this time click the Edit Configurations hyperlink to **edit** any of those fields.
 - b. To **Disable**, uncheck the box under status to disable this specific Program Tag. Click Save.
5. After clicking save, users will be returned to the list of existing Program Tags.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1 - 2

National Background Investigation Services

Parent Organization

Parent Organization

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu

Program Tags

Assignment Rules

Notifications

Form Routing

Workflow Builder

Service Catalog

Program Tags

Organization Relationships

Ingest Management

User Levels

Step 3

National Background Investigation Services

Parent Organization

Parent Organization

Configuration Menu

Program Tags

Program Tags

Create or modify existing program tags for your organization.

Defense Counterintelligence and Security Agency Program Tags

To add a new program tag, select the Actions button. To view and edit an existing program tag, select the hyperlink on the Program Tag Name.

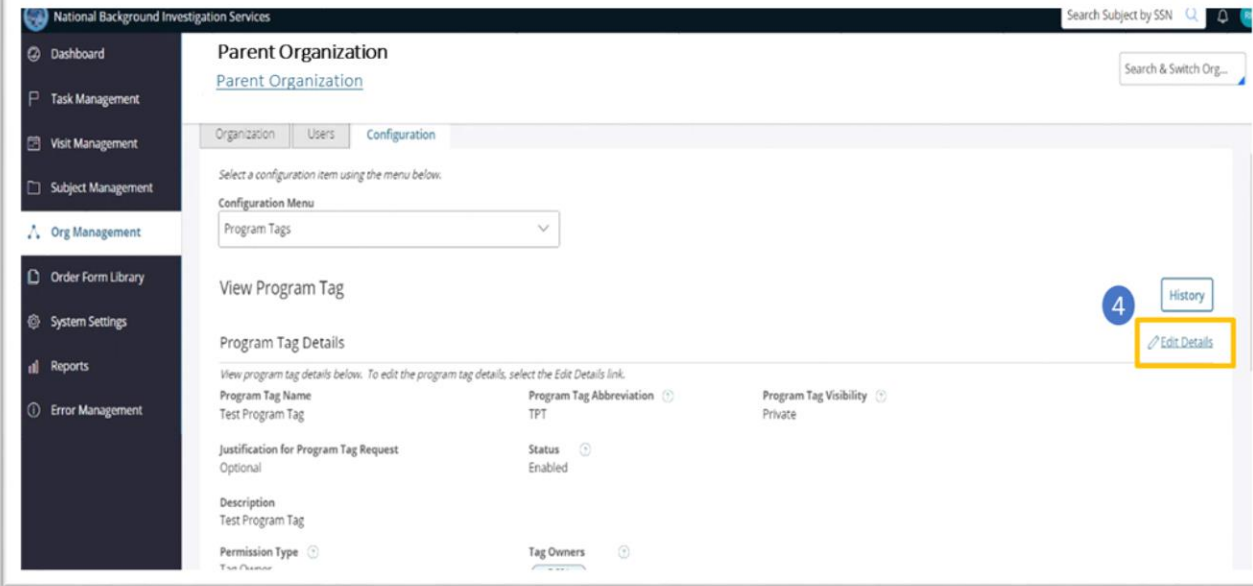
Program Tag Name	Program Tag Abbreviation*	Program Tag Visibility	Permission Type	Status	Actions
S-Words	SW	Private	Tag Owner	Enabled	
Tech Group	TG	Private	Tag Owner	Enabled	
Tech Group 2	TG2	Private	Tag Owner	Enabled	
Tester	TST	Public	Tag Owner	Enabled	
Test Program Tag	TPT	Private	Tag Owner	Enabled	



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 4



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

Parent Organization

Parent Organization

Search & Switch Org...

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu

Program Tags

View Program Tag

History

Edit Details

Program Tag Details

View program tag details below. To edit the program tag details, select the Edit Details link.

Program Tag Name

Test Program Tag

Program Tag Abbreviation

TPT

Program Tag Visibility

Private

Justification for Program Tag Request

Optional

Status

Enabled

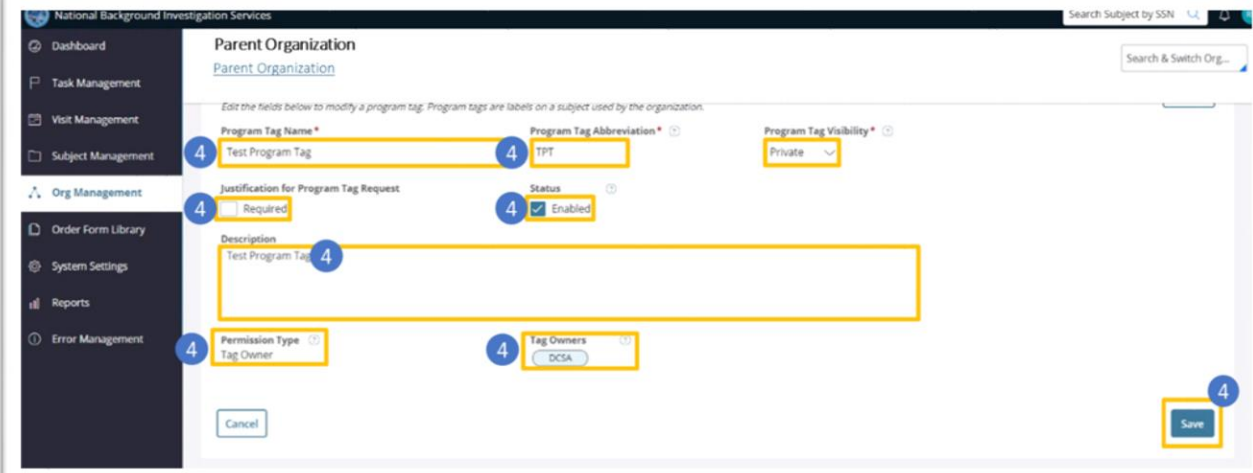
Description

Test Program Tag

Permission Type

Tag Owners

Step 4 (continued)



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

Parent Organization

Parent Organization

Search & Switch Org...

Edit the fields below to modify a program tag. Program tags are labels on a subject used by the organization.

Program Tag Name*

Test Program Tag

Program Tag Abbreviation*

TPT

Program Tag Visibility*

Private

Justification for Program Tag Request

Required

Status

Enabled

Description

Test Program Tag

Permission Type

Tag Owners

DCSA

Cancel

Save



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

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

Parent Organization

[Parent Organization](#)

Search & Switch Org...

Description
Test Program Tag

Permission Type
Tag Owner

Tag Owners
DCSA

Program Tag Configuration

View the program tag configuration details below. To edit the program tag configuration, select the Edit Configuration link.

Organization
Enabled

System Engines
Enabled

Tag Restrictions
No restrictions

[Back](#)

4 [Edit Configuration](#)

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

Parent Organization

[Parent Organization](#)

Search & Switch Org...

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu
Program Tags

4 [Edit Program Tag Configuration](#)

To configure the program tag, select the options below and select the Save button.

Organization
☒ Enabled

System Engines
☒ Enabled

Tag Restrictions
No restrictions

Open the case
☒ No

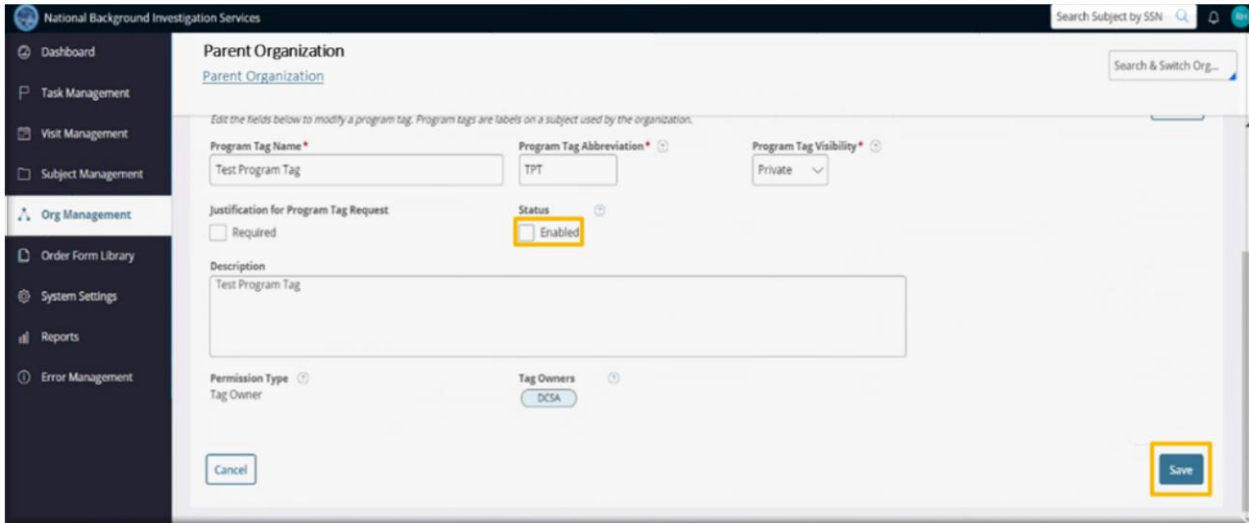
4 [Save](#)



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Disable Program Tag



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

Parent Organization

Parent Organization

Search & Switch Org...

Edit the fields below to modify a program tag. Program tags are labels on a subject used by the organization.

Program Tag Name*
Test Program Tag

Program Tag Abbreviation*
TPT

Program Tag Visibility*
Private

Justification for Program Tag Request
☐ Required

Status
☒ Enabled

Description
Test Program Tag

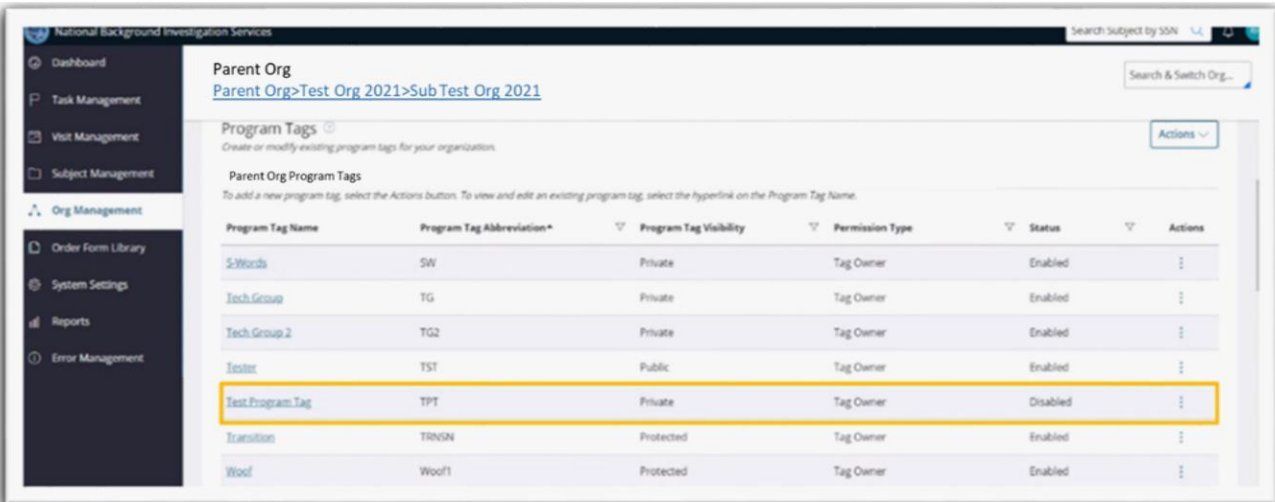
Permission Type
Tag Owner

Tag Owners
DCSA

Cancel

Save

Step 5



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

Parent Org

Parent Org>Test Org 2021>Sub Test Org 2021

Search & Switch Org...

Program Tags

Create or modify existing program tags for your organization.

Parent Org Program Tags

To add a new program tag, select the Actions button. To view and edit an existing program tag, select the hyperlink on the Program Tag Name.

Program Tag Name	Program Tag Abbreviation *	Program Tag Visibility	Permission Type	Status	Actions
S-Words	SW	Private	Tag Owner	Enabled	⋮
Tech Group	TG	Private	Tag Owner	Enabled	⋮
Tech Group 2	TG2	Private	Tag Owner	Enabled	⋮
Tester	TST	Public	Tag Owner	Enabled	⋮
Test Program Tag	TPT	Private	Tag Owner	Disabled	⋮
Transition	TRNSN	Protected	Tag Owner	Enabled	⋮
Woof	Woof1	Protected	Tag Owner	Enabled	⋮



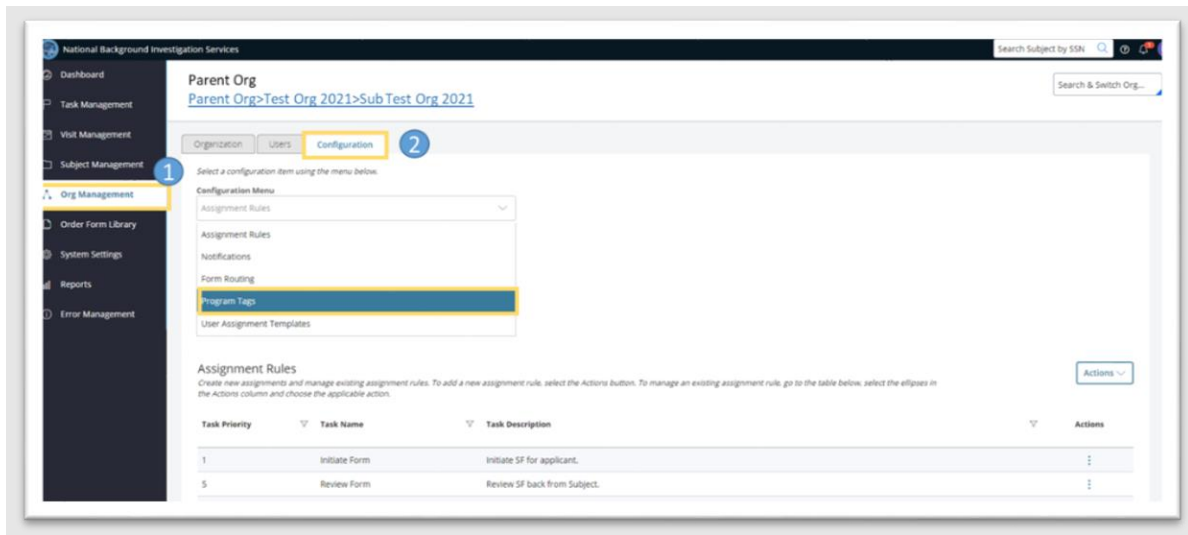
HOW TO APPROVE/REJECT PROGRAM TAGS

Purpose and Overview: Organizations may request to use tags from another organization. Users with the Program Tag Manager role can Approve/Reject Program Tag Requests for their org.

Below is the 5-step process for how to approve/reject Program Tags:

1. From log in, select **Org Management** from the Navigation Menu on the left. Switch to the designated org (if needed) and select the Configuration tab.
2. From the Configuration Menu, select **Program Tags**. Users will be prompted with the list of Program Tags and the Program Tag Library for their org.
3. Click the **Actions** button to reveal the options from the Actions drop-down menu and select **View Tag Requests**. The page will display all the Incoming and Outgoing Requests for a user's organization.
4. Incoming Requests are requests from other organizations to gain access to tags the current organization is an Owner/Modifier of. Outgoing Requests lists the requests for the current organization to gain access to other org's protected Program Tags. Check the box that says **"Include Completed Requests"** to reveal additional Program Tag requests.
5. To approve or reject an incoming tag request, select the Program Tag Name on the request or select the **ellipses** under the Actions column. The Program Tag Request Details screen shows all the relevant information on the request. The Program Tag Details are found at the bottom to remind the user which tag this organization is requesting. Select **Reject/Approve** in the bottom right corner.

Steps 1-2

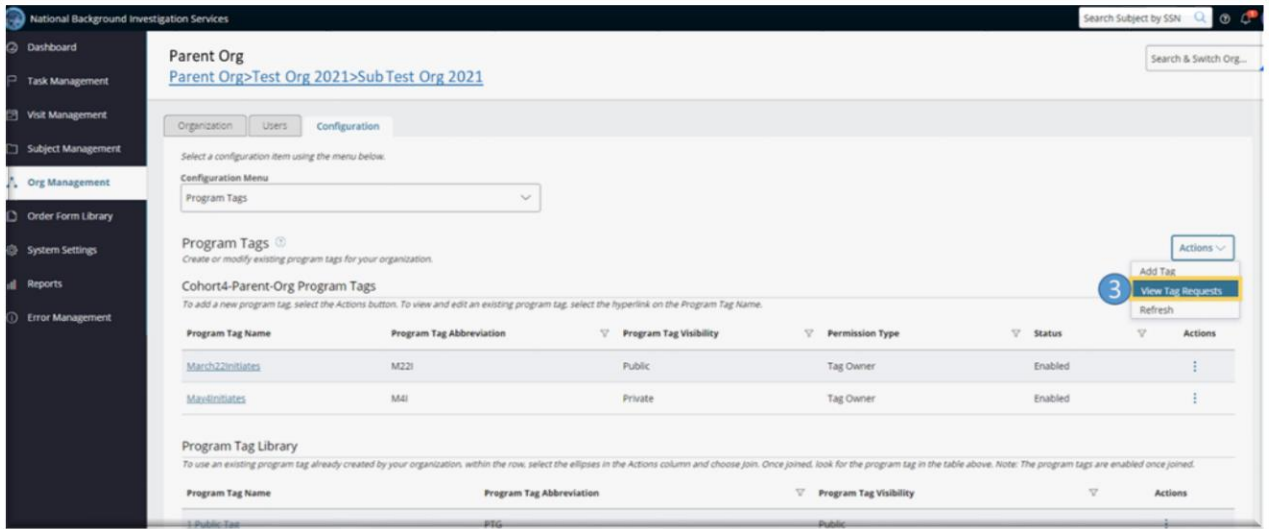




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 3



Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu
Program Tags

Program Tags
Create or modify existing program tags for your organization.

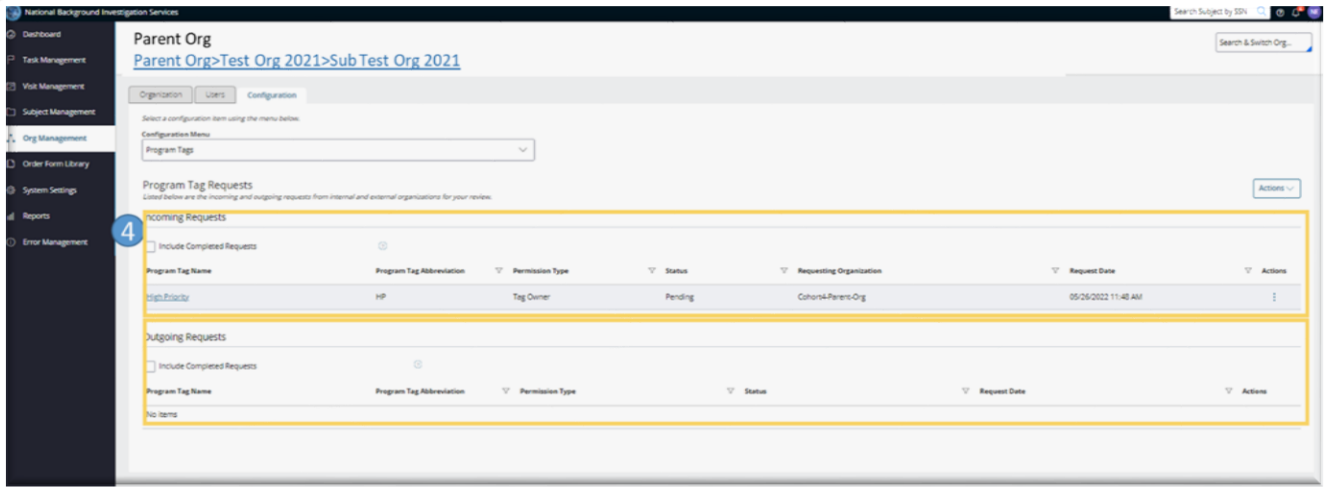
Cohort4-Parent-Org Program Tags
To add a new program tag, select the Actions button. To view and edit an existing program tag, select the hyperlink on the Program Tag Name.

Program Tag Name	Program Tag Abbreviation	Program Tag Visibility	Permission Type	Status	Actions
March22initiates	M22I	Public	Tag Owner	Enabled	View Tag Requests
Mayinitiates	M4I	Private	Tag Owner	Enabled	View Tag Requests

Program Tag Library
To use an existing program tag already created by your organization, within the row, select the ellipses in the Actions column and choose join. Once joined, look for the program tag in the table above. Note: The program tags are enabled once joined.

Program Tag Name	Program Tag Abbreviation	Program Tag Visibility	Actions
Public Tag	PTG	Public	View Tag Requests

Step 4



Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu
Program Tags

Program Tag Requests
Listed below are the incoming and outgoing requests from internal and external organizations for your review.

Incoming Requests

Program Tag Name	Program Tag Abbreviation	Permission Type	Status	Requesting Organization	Request Date	Actions
High Priority	HP	Tag Owner	Pending	Cohort4-Parent-Org	05/26/2022 11:45 AM	View Tag Requests

Outgoing Requests

Program Tag Name	Program Tag Abbreviation	Permission Type	Status	Request Date	Actions
No items					



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 5

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu

Program Tags

Request Overview

View the details of this request below. To view the historical information of this request, select the History button. To approve or reject the request, select the Approve or Reject button at the bottom of the page. To view the request history, select the History button.

History

Request Details

Requesting Organization	Requesting Organization Path	Request Permission Type	Status
CIP	NBIS/RED/ENOC/CAB/DOO/48-DCSA/CAP	Tag Owner	Pending
Request Date 05/26/2022 11:48 AM			

Requesting Reason

Job Aid

Program Tag Details

View program tag details below. To edit the program tag details, select the Edit Details link.

Program Tag Name	Program Tag Abbreviation	Program Tag Visibility
High Priority	HP	PUBLIC
Justification for Program Tag Request	Status	
Optional	Enabled	
Description		
High Priority - action AGAP		
Permission Type		
Tag Owner		

Back

5

Report Approve



USER ASSIGNMENTS

User Role Required: User Manager. Users with the User Manager Role can create and manage users within their organizations, this includes managing the phases and case types a user can work.

Purpose and Overview: User assignments manage the number and types of phases and cases users are permitted to work within the context of the organization.

User assignments are a **required** configuration as users who will be conducting I-R-A related duties must have them in order to be able to work cases within the org. User Assignment templates are an optional way to create standard templates that are built at the org level, then applied to users within the org to identify their workload capabilities. If multiple users will have the same workload capabilities, a template creates efficiencies when applying the capabilities to the user. User Assignments can also be created & applied individually within the user's profile.

HOW TO CREATE USER ASSIGNMENT TEMPLATES

Purpose and Overview: User Assignment Templates are used to apply assignment attributes to an individual user in one persona. Multiple assignments can be added within one template. This can be particularly helpful if you have many users that require the same workload capabilities. User Assignment Templates are not required to be completed if org will manually assign cases. Assignment Templates are used when org would like to automatically assign cases.

Below is the 12-step process for how to create User Assignment Templates:

1. From log in, select **Org Management** from the navigation menu on the left.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
3. From the Configuration Menu drop-down, select **User Assignment Templates**.
4. To create a new template, select **Add Template**.
5. Provide the Template Name, Status, Display Order, Description, User Capacity, and Assignment Threshold.
 - a. The User Capacity defines the maximum number of assignments a user can automatically be assigned (max of 999); however, users can still be assigned a case manually, which may exceed the user's capacity.
 - b. The Assignment Threshold defines the number of assignments a user owns before the system automatically assigns additional tasks. The Assignment Threshold must be at least one below the User Capacity.
7. Select **Add Assignment** to add an assignment within the User Assignment Template. Multiple assignments can be added to one template.
8. Enter the **Assignment Name**. Select the **Phase** for the assignment from the drop-down menu. The phase determines what phase of the case the user can work on. Additional fields will populate depending on the phase selected.

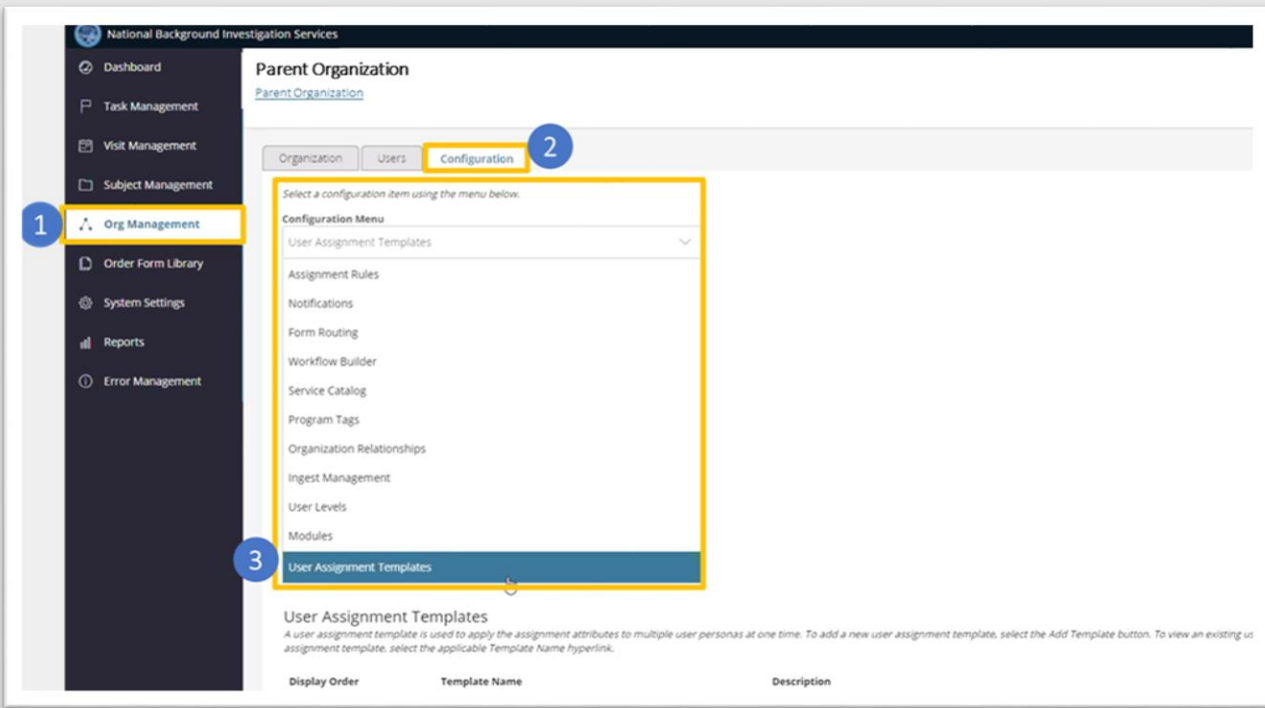


DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

9. From the drop-down menus, select the appropriate **Case Type(s)** and **Workflow Status** for the user. These sections indicate the types of cases or tasks users want a user to be capable of working.
10. From the drop-down menu, select any applicable **Program Tags** needed for this assignment configuration.
 1. **Note:** Program Tags with no restrictions do not need to be added to user assignments. Only Program Tags with restrictions need to be added to user assignment templates to identify which users can work cases with these restrictive Program Tags.
11. Select the **Assignment Method**. Select either Manually Assign to a Capable User or Automatic and/or Manual Assignment.
 - a. Manually Assign to a Capable User will require the Org Workload Manager &/or Task Reassignment user to assign each case to a user individually
 - b. Automatic &/or Manual Assignment will allow the system to automatically assign work based on user roles, user assignments, and assignment rules and will also allow the Org Workload Manager &/or Task Reassignment user to manually assign cases to users.
12. Select **+Add Assignment** to add another assignment within the same template or click **Save and Add** if additional assignments are not needed.

Steps 1 -3



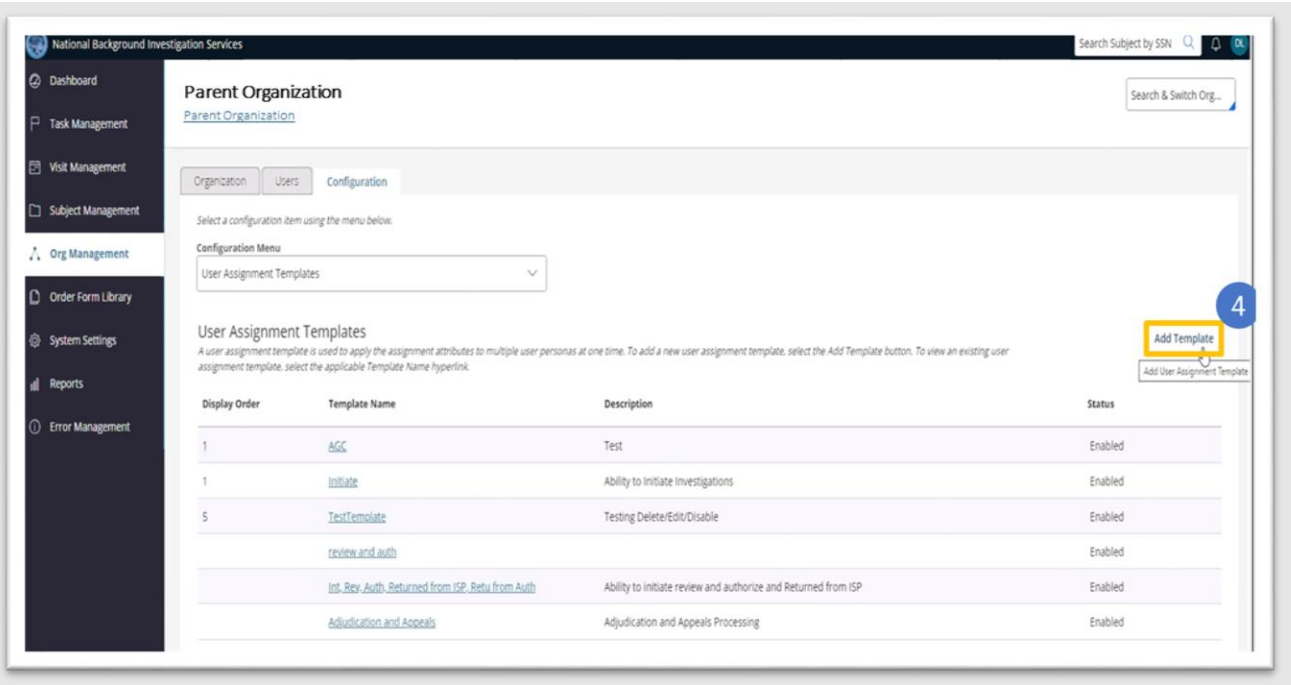
The screenshot displays the NBIS Job Aid interface. On the left is a dark sidebar with navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management (highlighted with a blue circle and the number 1), Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Parent Organization' and has three tabs: Organization, Users, and Configuration (highlighted with a blue circle and the number 2). Below the Configuration tab is a 'Configuration Menu' with a list of items: User Assignment Templates, Assignment Rules, Notifications, Form Routing, Workflow Builder, Service Catalog, Program Tags, Organization Relationships, Ingest Management, User Levels, and Modules. The 'User Assignment Templates' item is highlighted with a blue circle and the number 3. Below the menu is a section titled 'User Assignment Templates' with a brief description and a table with columns for Display Order, Template Name, and Description.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 4



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

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

Parent Organization

Parent Organization

Organization Users Configuration

Select a configuration item using the menu below:

Configuration Menu

User Assignment Templates

User Assignment Templates

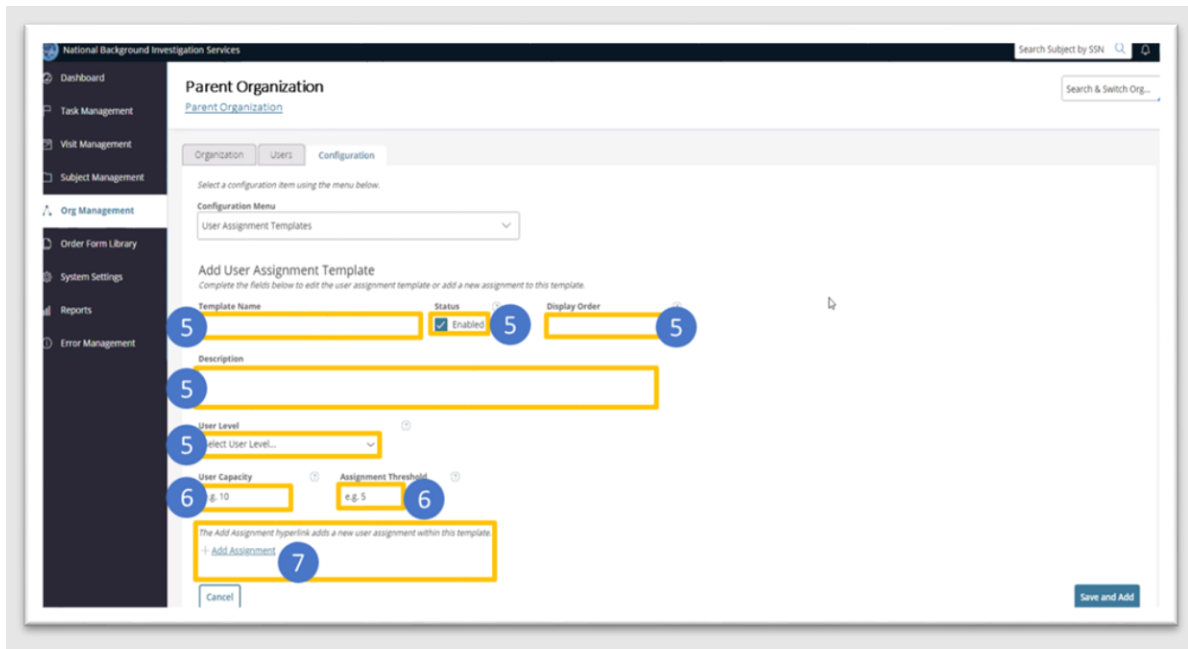
A user assignment template is used to apply the assignment attributes to multiple user personas at one time. To add a new user assignment template, select the Add Template button. To view an existing user assignment template, select the applicable Template Name hyperlink.

Display Order	Template Name	Description	Status
1	AGC	Test	Enabled
1	Initiate	Ability to Initiate Investigations	Enabled
5	TestTemplate	Testing Delete/Edit/Disable	Enabled
	review and auth		Enabled
	Int. Rev. Auth. Returned from ISP. Retu from Auth	Ability to initiate review and authorize and Returned from ISP	Enabled
	Adjudication and Appeals	Adjudication and Appeals Processing	Enabled

4 Add Template

Add User Assignment Template

Steps 5 - 7



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

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

Parent Organization

Parent Organization

Organization Users Configuration

Select a configuration item using the menu below:

Configuration Menu

User Assignment Templates

Add User Assignment Template

Complete the fields below to edit the user assignment template or add a new assignment to this template.

5 Template Name 5 Status ☒ Enabled 5 Display Order 5

5 Description

5 User Level Select User Level...

6 User Capacity e.g. 10 6 Assignment Threshold e.g. 5 6

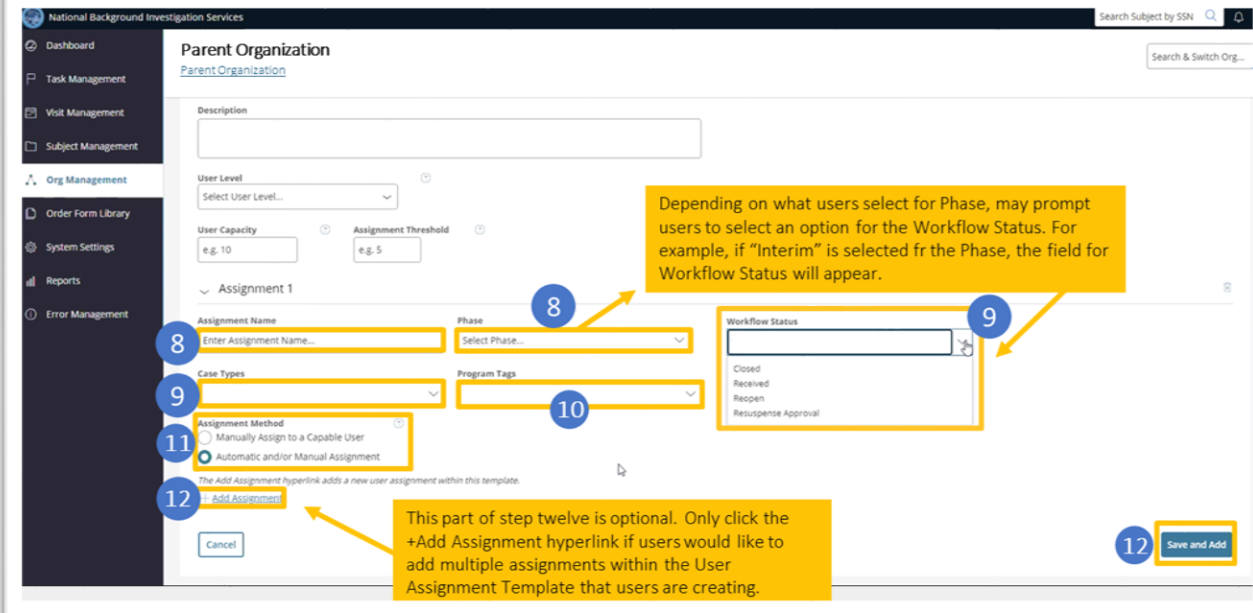
The Add Assignment hyperlink adds a new user assignment within this template.

7 Add Assignment

Cancel Save and Add



Step 8 -12



Depending on what users select for Phase, may prompt users to select an option for the Workflow Status. For example, if "Interim" is selected for the Phase, the field for Workflow Status will appear.

This part of step twelve is optional. Only click the +Add Assignment hyperlink if users would like to add multiple assignments within the User Assignment Template that users are creating.

HOW TO VIEW USER ASSIGNMENT TEMPLATES

Purpose and Overview: Once a User Assignment Template has been created, Users with the User Manager role can also view User Assignment Templates.

Below is the 4-step process for how to view User Assignment Templates:

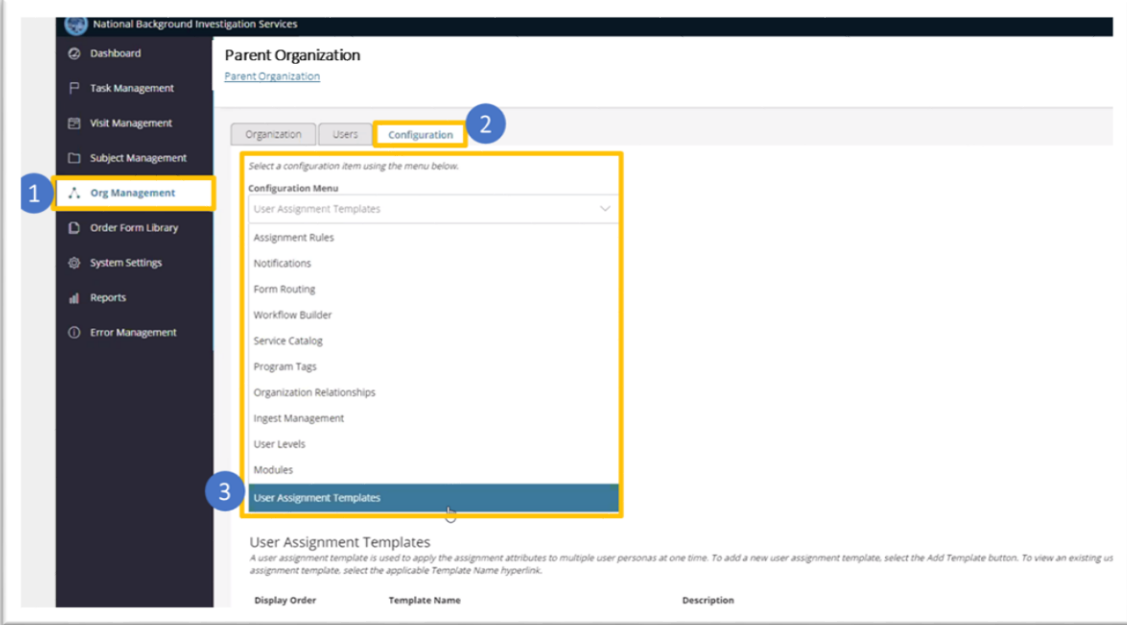
1. From log in, select **Org Management** from the navigation menu on the left.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
3. From the Configuration Menu, select **User Assignment Templates**. This will provide users with the list of existing User Assignment Templates.
4. Select the **hyperlink** within the Template Name column to view the details of any specific User Assignment template.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1- 3



National Background Investigation Services

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

Parent Organization
[Parent Organization](#)

Organization Users **Configuration**

Select a configuration item using the menu below.

Configuration Menu

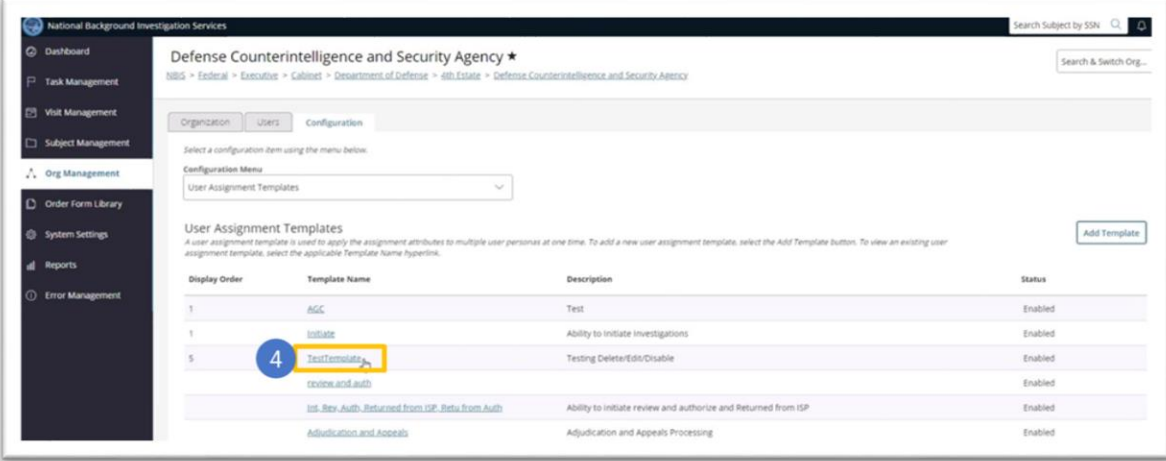
- User Assignment Templates
- Assignment Rules
- Notifications
- Form Routing
- Workflow Builder
- Service Catalog
- Program Tags
- Organization Relationships
- Ingest Management
- User Levels
- Modules
- User Assignment Templates**

User Assignment Templates

A user assignment template is used to apply the assignment attributes to multiple user personas at one time. To add a new user assignment template, select the Add Template button. To view an existing user assignment template, select the applicable Template Name hyperlink.

Display Order	Template Name	Description
---------------	---------------	-------------

Step 4



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

Defense Counterintelligence and Security Agency ★

NBIS > Federal > Executive > Cabinet > Department of Defense > 6th Estate > Defense Counterintelligence and Security Agency

Search & Switch Org...

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu

User Assignment Templates

User Assignment Templates

A user assignment template is used to apply the assignment attributes to multiple user personas at one time. To add a new user assignment template, select the Add Template button. To view an existing user assignment template, select the applicable Template Name hyperlink.

Add Template

Display Order	Template Name	Description	Status
1	ASG	Test	Enabled
1	Initiate	Ability to Initiate Investigations	Enabled
5	TestTemplate	Testing Delete/Eds/Disable	Enabled
	review and auth		Enabled
	Int. Rev. Auth. Returned from ISP. Retn. from Auth.	Ability to initiate review and authorize and Returned from ISP	Enabled
	Adjudication and Appeals	Adjudication and Appeals Processing	Enabled



HOW TO EDIT/DISABLE/DELETE USER ASSIGNMENT TEMPLATES

Purpose and Overview: User Managers can edit User Assignment Templates as needed. Users with the User Manager role can also delete a User Assignment Template if a user's assignment changes or if the team's assignments change, or disable a User Assignment Template if users may not need to use the template now, but may need to use it again later. A disabled User Assignment Template can be re-enabled at any time. However, once the User Assignment Template has been deleted it cannot be retrieved and is permanently deleted.

Below outlines the process to edit, disable, or delete User Assignment Templates:

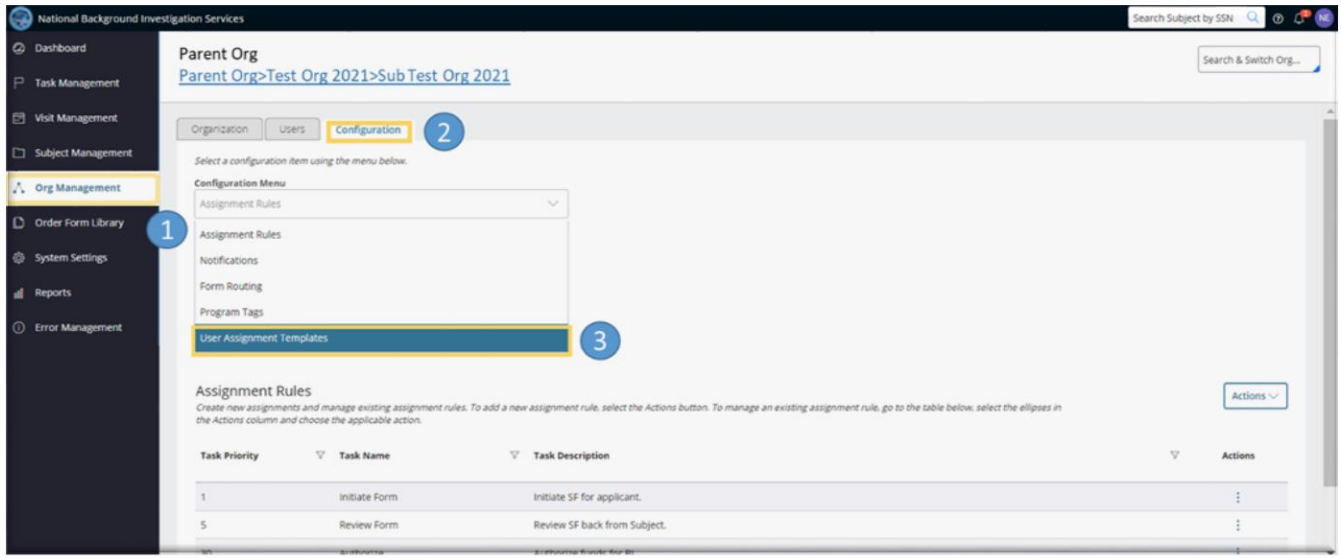
1. From log in, select **Org Management** from the navigation menu on the left.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
3. From the Configuration Menu drop-down, select **User Assignment Templates**.
4. From the list of User Assignment Templates, select the actual template users would like to edit under the Template Name column.
5. Select the **Actions** drop-down menu. Users will be prompted with Edit and Delete options.
6. To edit the User Assignment Template, select **Edit Template**; this will bring users to the Edit User Assignment Templates page. From the Edit User Assignment Templates page, users can configure and edit any User Assignment Template details.
 - a. Select the **+Add Assignment hyperlink** to add a new assignment within the existing User Assignment Template. Complete all required fields including Assignment Name, Phase, Case Types, Program Tags and Assignment Method. Existing assignments can also be modified or deleted if needed. Click **Save** at the bottom right corner. After users click Save, users will return to User Assignment Templates home screen/User Assignment Templates list.
 - b. **Note:** Edits made to an existing user assignment template will not be reflected in user profiles with the template applied. User Managers will need to update the template for affected users after the template has been modified.
 - c. To **Disable** the User Assignment Template, edit the User Assignment Template and uncheck the **Enabled box** beneath status in order to disable the User Assignment Template. Click **Save** in the bottom right corner. Users will return to the list of existing User Assignment Templates displaying all User Assignment Templates organized by their display order.
 - d. To delete the User Assignment Template, select **Delete Template**. Users will be prompted with a warning screen. Select Delete again. The deleted User Assignment Template will not appear in the list of existing User Assignment Templates screen; this will be confirmation that users successfully deleted the User Assignment Template.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1-3



National Background Investigation Services

Search Subject by SSN

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration 2

Select a configuration item using the menu below.

Configuration Menu

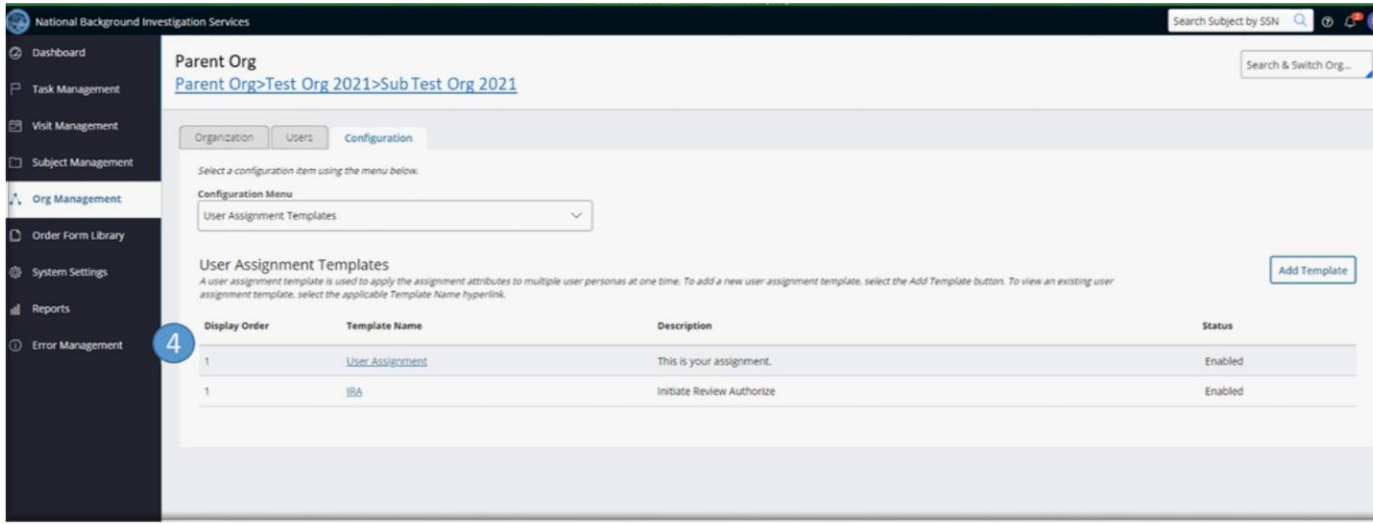
- Assignment Rules
- Assignment Rules
- Notifications
- Form Routing
- Program Tags
- User Assignment Templates 3

Assignment Rules

Create new assignments and manage existing assignment rules. To add a new assignment rule, select the Actions button. To manage an existing assignment rule, go to the table below, select the ellipses in the Actions column and choose the applicable action.

Task Priority	Task Name	Task Description	Actions
1	Initiate Form	Initiate SF for applicant.	⋮
5	Review Form	Review SF back from Subject.	⋮

Step 4



National Background Investigation Services

Search Subject by SSN

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu

- User Assignment Templates

User Assignment Templates

A user assignment template is used to apply the assignment attributes to multiple user personas at one time. To add a new user assignment template, select the Add Template button. To view an existing user assignment template, select the applicable Template Name hyperlink.

Add Template

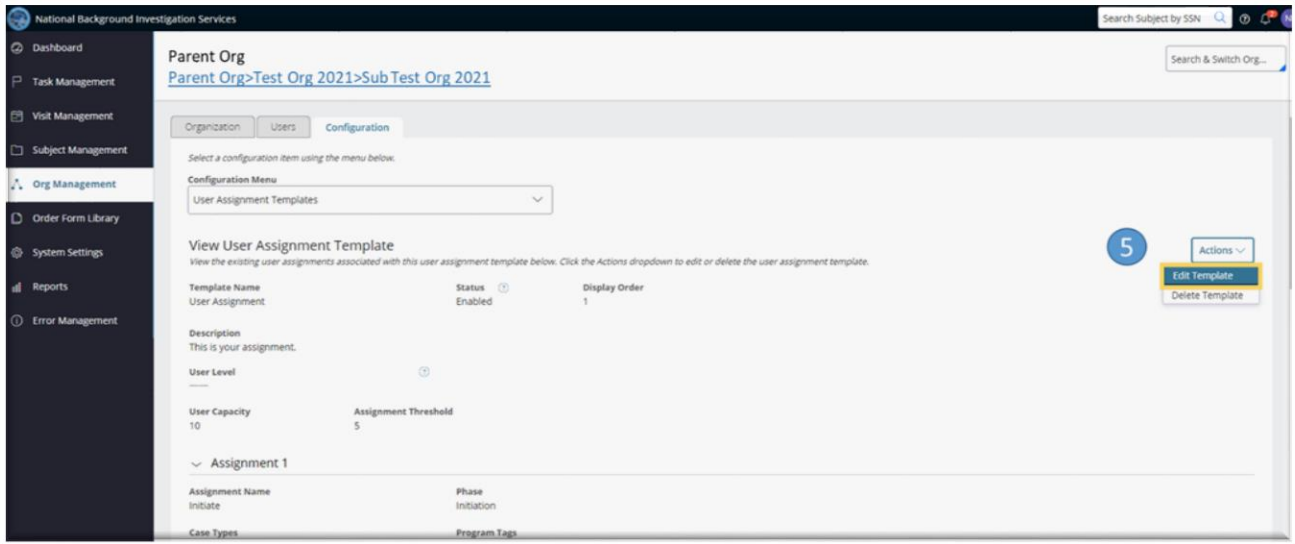
Display Order	Template Name	Description	Status
1	User Assignment	This is your assignment.	Enabled
1	ISA	Initiate Review Authorize	Enabled



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 5



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Parent Org

[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration

Select a configuration item using the menu below:

Configuration Menu

User Assignment Templates

View User Assignment Template

View the existing user assignments associated with this user assignment template below. Click the Actions dropdown to edit or delete the user assignment template.

Template Name: User Assignment

Status: Enabled

Display Order: 1

Description: This is your assignment.

User Level: Select User Level...

User Capacity: 10

Assignment Threshold: 5

Assignment 1

Assignment Name: Initiate

Phase: Initiation

Case Types

Program Tags

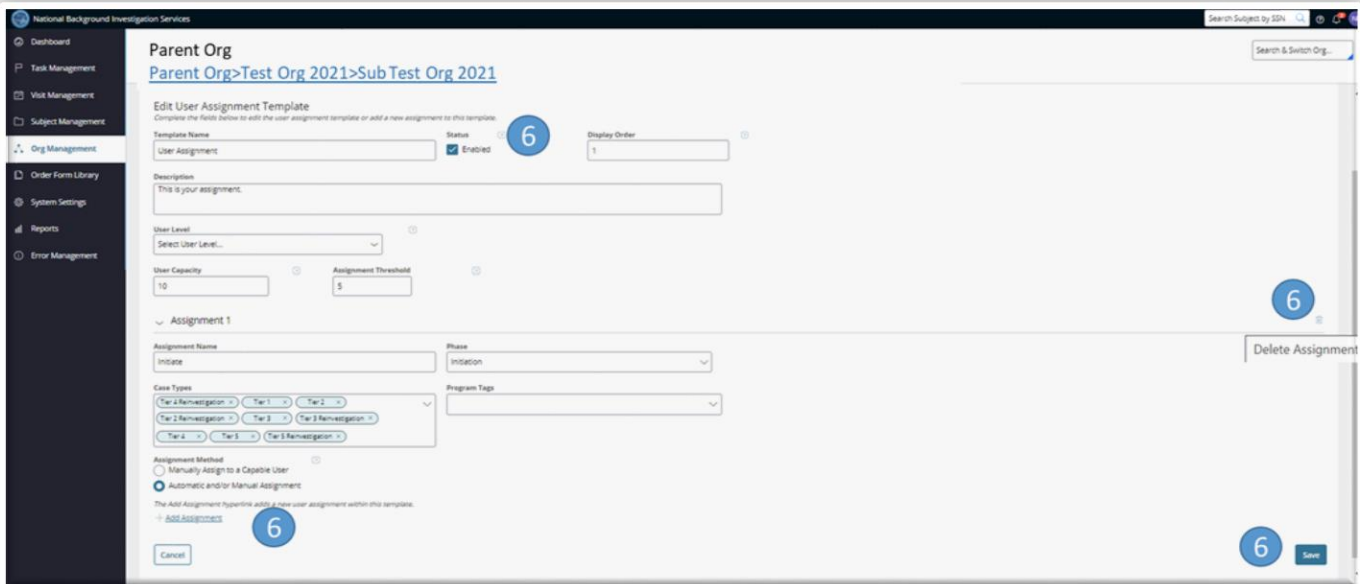
5

Actions

Edit Template

Delete Template

Step 6



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Parent Org

[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Edit User Assignment Template

Complete the fields below to edit the user assignment template or add a new assignment to this template.

Template Name: User Assignment

Status: ☒ Enabled

Display Order: 1

Description: This is your assignment.

User Level: Select User Level...

User Capacity: 10

Assignment Threshold: 5

Assignment 1

Assignment Name: Initiate

Phase: Initiation

Case Types

Program Tags

Assignment Method

☐ Manually Assign to a Capable User

☒ Automatic and/or Manual Assignment

The Add Assignment hyperlink adds a new user assignment within this template.

[Add Assignment](#)

6

6

Delete Assignment

6

Save



HOW TO ADD/EDIT USER ASSIGNMENTS/USER ASSIGNMENT TEMPLATE

Purpose and Overview: User Assignments manage the type and number of tasks a user is permitted to perform within the context of the organization and allow a user to work on cases with certain attributes. User Assignment Templates can be applied when creating/editing a user from the Manage User Assignments tab. When creating a new user, a notification will populate prior to saving as a warning that a user is being created that has no user assignments (and therefore can do no I-R-A work).

Below is the 10-step process for how the users with the User Manager role can add a User Assignment or User Assignment Template to an existing user:

1. From initial log in, select the **Org Management** tab from the navigation menu on the left.
2. Switch to the designated Org (if needed) and select the **Users** tab.
3. Scroll through the existing users from the User List to **identify the user** to add/apply an assignment template to.
4. From the Actions column, select the **ellipses** (three vertical dots) and select **View Details** to be prompted with the User Profile screen.
5. Click the **hyperlink** for the user's persona under the persona name column. If a user has multiple personas, make sure to select the Persona needed to edit and be prompted with Persona Settings page.
6. Select **Manage User Assignments** tab.
7. Using the Organization drop-down menu, ensure the appropriate org requiring editing is selected.
8. Click the **Edit** button on bottom right of screen.
 - a. To manually add assignments to a user, complete all required fields, including those from step 7 in addition to selecting the Organization, User Capacity, and Assignment Threshold.
 - b. **Note:** User Assignments can be edited using this same process. Existing user assignments can be removed or modified, additional assignments can be added, and templates applied to the user can be changed.
9. To apply a previously created template to the user, select the appropriate User Assignment Template from the User Assignment Template drop-down to add to the user, then select **Apply Template**.
 - a. After selecting/applying the appropriate template, the User Assignment Template details will display. A user can only have one User Assignment Template applied to them at a time.
 - b. Verify that the details of the assignment are accurate (Assignment Name, Phase, Case Types and Assignment Method). After the template is applied, it can be modified for that user within their profile &/or additional assignments can be added to their profile by



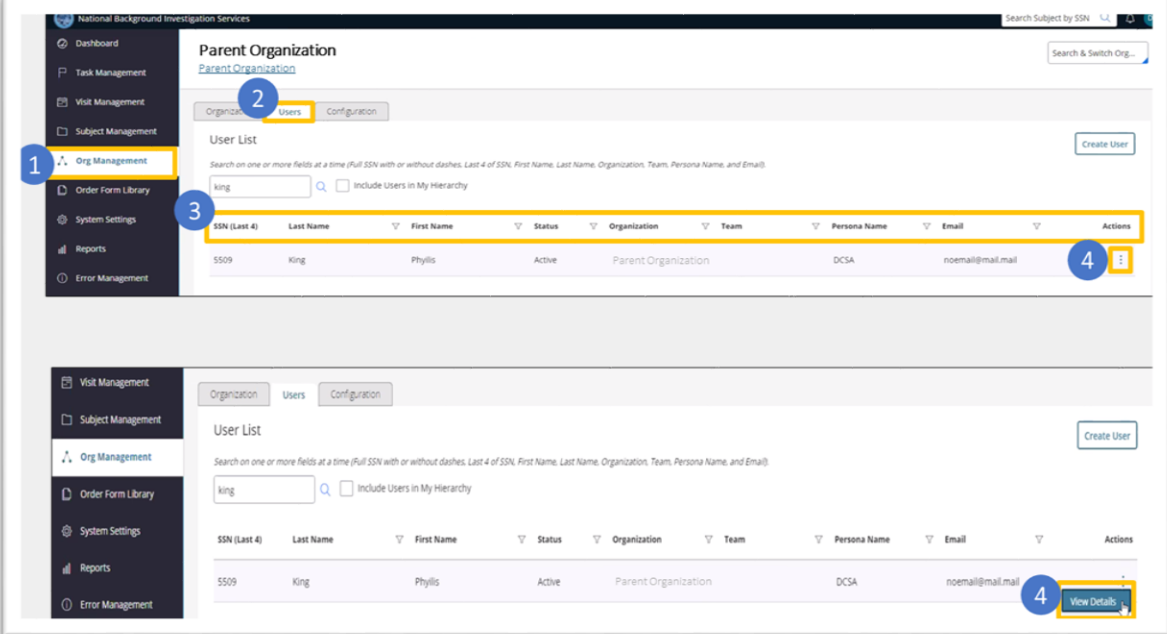
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

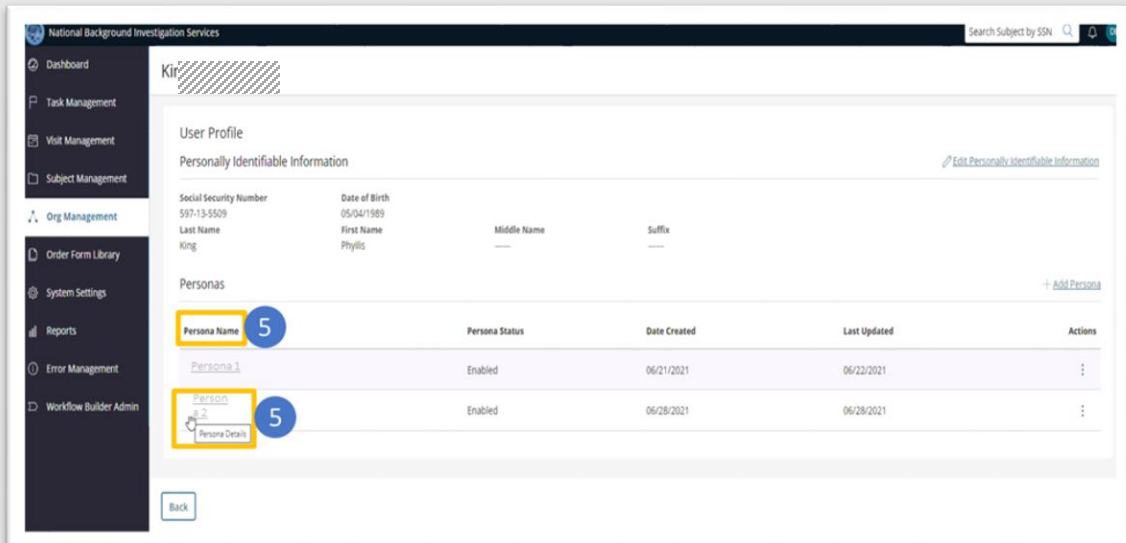
clicking the +Add Assignment button. Modifying the template after it has been applied to the user will not change the saved copy.

10. Once all assignments are added, select **Save** at the bottom right of the User Profile.

Step 1 - 4



Step 5

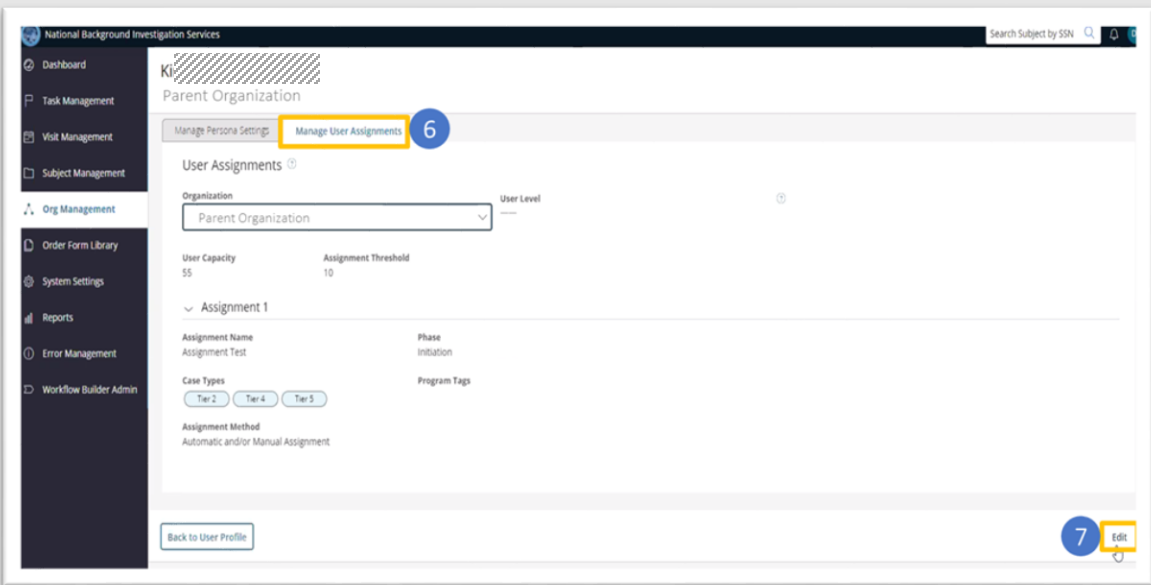




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 6-7



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
Workflow Builder Admin

Manage Persona Settings Manage User Assignments 6

User Assignments

Organization: Parent Organization User Level: --

User Capacity: 55 Assignment Threshold: 10

Assignment 1

Assignment Name: Assignment Test Phase: Initiation

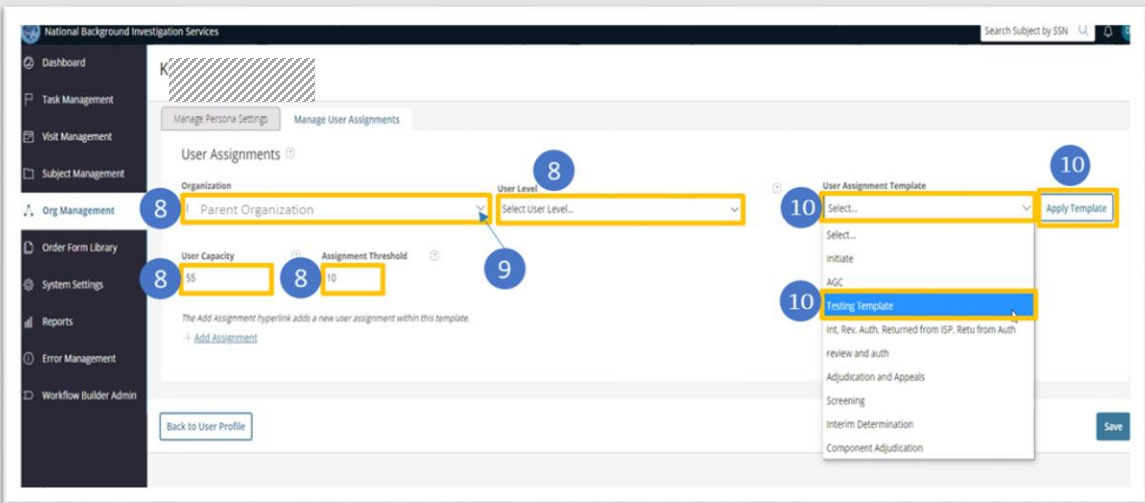
Case Types: Tier 2 Tier 4 Tier 5 Program Tags

Assignment Method: Automatic and/or Manual Assignment

Back to User Profile

7 Edit

Steps 8-10



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
Workflow Builder Admin

Manage Persona Settings Manage User Assignments

User Assignments

Organization: Parent Organization User Level: Select User Level... 8

User Capacity: 55 Assignment Threshold: 10 8 9

The Add Assignment hyperlink adds a new user assignment within this template.
+ Add Assignment

Back to User Profile

User Assignment Template: Select... 10

Apply Template

Select...
Initiate
AGC
Testing template 10
Int. Rev. Auth. Returned from ISP, Retu from Auth review and auth
Adjudication and Appeals
Screening
Interim Determination
Component Adjudication

Save



ASSIGNMENT RULES

User Role Required: Org Assignment Manager. The Org Assignment Manager is responsible for setting the organization's priorities for work assignments to enable automatic routing of tasks.

Purpose and Overview: Assignment rules control the order in which tasks are processed and set the priority for how an organization's cases are assigned to users. Assignment Rules work in tandem with User Assignments to assign work by adding specific criteria and restrictions on case assignments. For example, Assignment Rules can be used to assign Tier 1 cases before Tier 3 cases or cases in the Review phase before cases in the Authorization phase. Cases are assigned to a user's workbasket based on the user's roles, assignments, and the organization's assignment rules.

Assignment rules are an **optional** configuration. They can be created to support the org's workload prioritization and distribution needs.

HOW TO VIEW ASSIGNMENT RULES

Purpose and Overview: Org Assignment Managers can view the details of their org's Assignment Rules.

Below is the 4-step process for how to view an Assignment Rule:

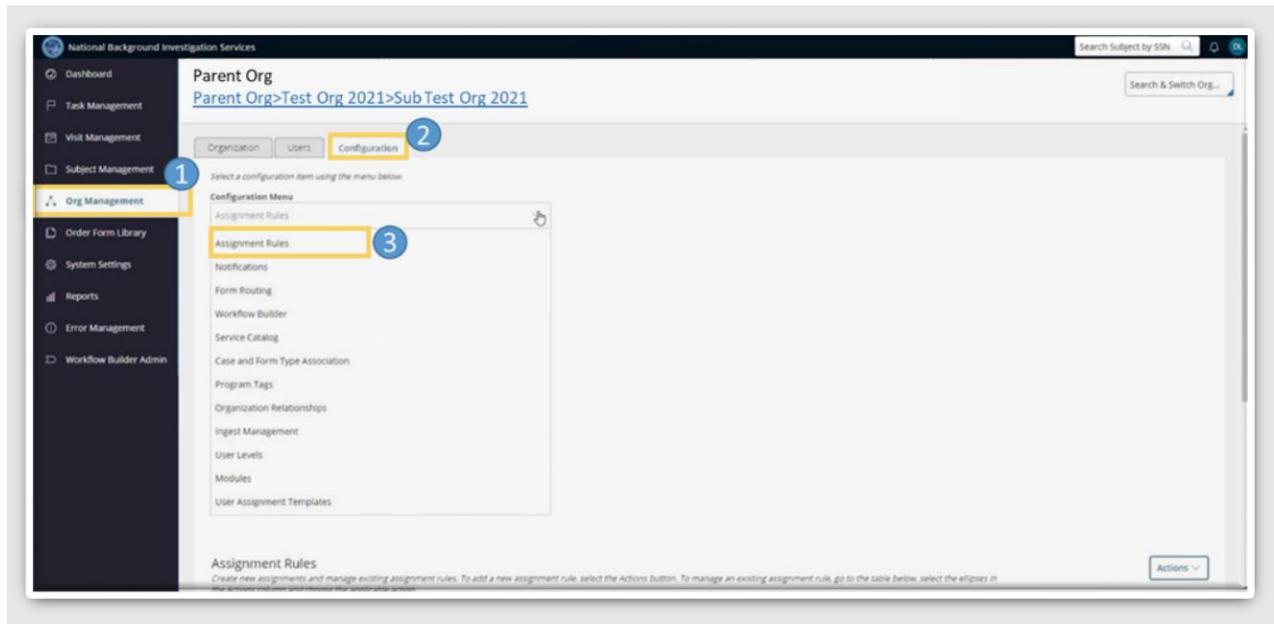
1. From log in, select **Org Management** from the Navigation Menu on the left.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
3. From the Configuration Menu, select **Assignment Rules**. The screen will display a prioritized list of existing Assignment Rules.
4. In the table of Assignment Rules, under the Actions column, select the **ellipses** for the specific rule and select **View Details**.



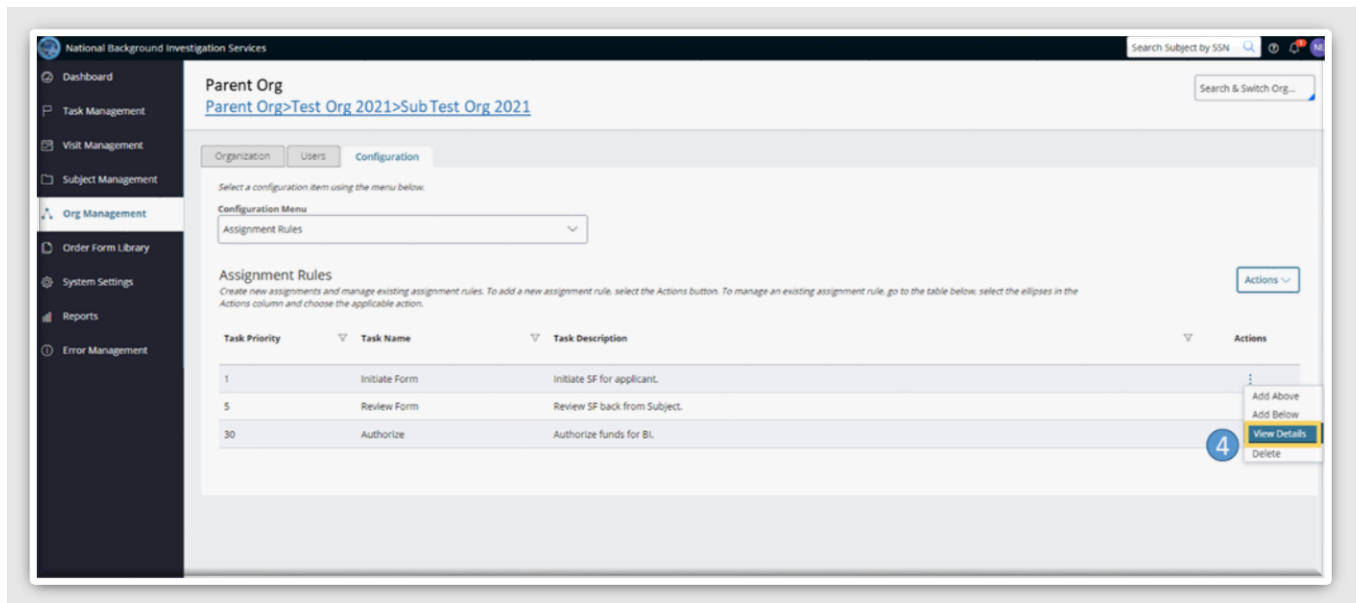
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Step 1 - 3



Step 4





HOW TO ADD ASSIGNMENT RULES

Purpose and Overview: Users with the Org Assignment Manager role can add and manage Assignment Rules for their org. Assignment Rules determine the order in which tasks are assigned.

Below is the 12-step process for how to add an Assignment Rule:

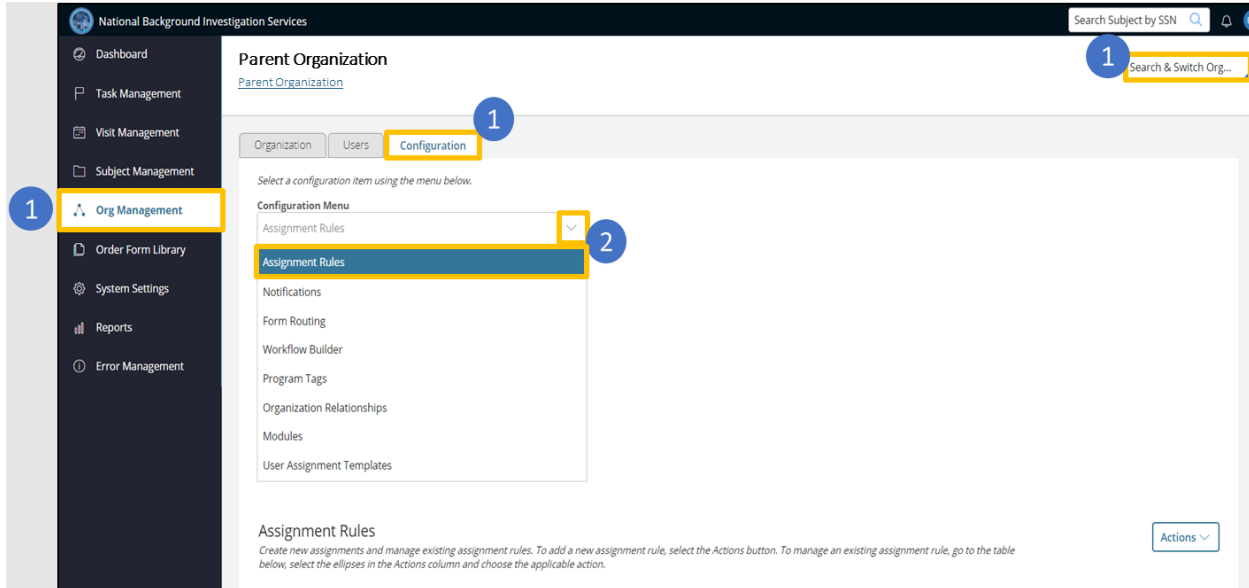
1. From the Navigation Menu on the left, select **Org Management**.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
2. From the Configuration menu, select **Assignment Rules**.
3. There are two ways to add a new Assignment Rule. The first option is to select **"Add Rule"** from the Actions drop-down. The second option is to click the **ellipses** under the Actions column. Select Add Above or Add Below according to the priority of the new rule.
4. **Complete all required fields** (marked with an asterisk) within the Task Name, Task Description, Task Category and Priority, and Task Details sections of the "Add Assignment Rules" page.
5. In the Phase field, **select the phase** the assignment rule pertains to. Phases include Initiation, Review, Authorization, Returned from ISP, & Returned from Authorizer.
6. In the Case Type field, **select the appropriate case type, or select "Any" if the rule applies to all case types worked within the org**.
 - a. **Note:** If not selecting any for case type, only one case type may be selected per assignment rule.
7. **Set the Task Priority**. This is a system-generated numeric value used to determine the order and of Assignment Rule processing. The priority is used to determine the order of processing. The lower the number, the higher the priority. The Org Assignment Manager can change the system-generated priority value to meet the needs of the rule. Equal priority can be given to more than one assignment rule.
8. Assign the case to a user from the **"Assign To"** drop-down menu. Options include Previous Owner, Any Capable User, Case Owner (not applicable for I-R-A assignment rules) and Subject Owner (not applicable for I-R-A assignment rules).
 - a. **Note:** If Previous Owner is selected, an additional optional field will appear to **Set the Assignee Duration**, which when completed defines the number of calendar days a task will remain with the previous owner before being re-routed to another capable user.
9. **Set the Move Task Timer, if applicable**, to identify how long the task can remain with the current assignee if it is not worked on before it is routed to another user.
10. **Set the Case Duration**, if applicable, to identify how long the case remains a priority based on when the case was initiated.
11. Select the appropriate **Program Tags**, if applicable.
 - a. **Note:** While this field is present and can be completed, full functionality for I-R-A is a future capability. Selecting a program tag at present may result in error.
12. Select **Save and Add**.



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JOB AID

Steps 1 -2



National Background Investigation Services

Search Subject by SSN

1 Search & Switch Org...

Parent Organization

Parent Organization

1

Configuration

Select a configuration item using the menu below.

Configuration Menu

Assignment Rules

2

Assignment Rules

Notifications

Form Routing

Workflow Builder

Program Tags

Organization Relationships

Modules

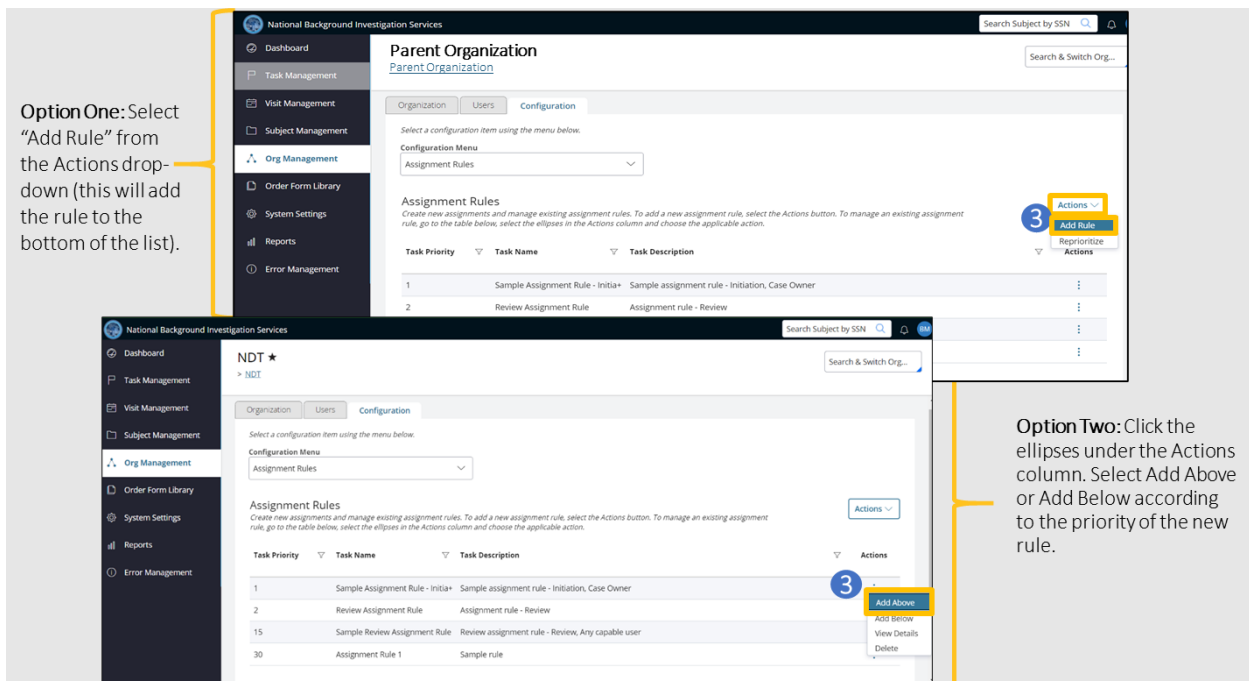
User Assignment Templates

Assignment Rules

Create new assignments and manage existing assignment rules. To add a new assignment rule, select the Actions button. To manage an existing assignment rule, go to the table below, select the ellipses in the Actions column and choose the applicable action.

Actions

Step 3



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Parent Organization

Parent Organization

Option One: Select "Add Rule" from the Actions drop-down (this will add the rule to the bottom of the list).

3

Actions

Add Rule

Reprioritize

Actions

Assignment Rules

Create new assignments and manage existing assignment rules. To add a new assignment rule, select the Actions button. To manage an existing assignment rule, go to the table below, select the ellipses in the Actions column and choose the applicable action.

Task Priority	Task Name	Task Description	Actions
1	Sample Assignment Rule - Initia	Sample assignment rule - Initiation, Case Owner	⋮
2	Review Assignment Rule	Assignment rule - Review	⋮
15	Sample Review Assignment Rule	Review assignment rule - Review, Any capable user	⋮
30	Assignment Rule 1	Sample rule	⋮

Option Two: Click the ellipses under the Actions column. Select Add Above or Add Below according to the priority of the new rule.

3

Add Above

Add Below

View Details

Delete



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 4

National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Parent Organization

Complete the fields below for an existing assignment rule to edit a task for your organization.

Task Name*

Newly Created Assignment Rule

Task Description*

Creating this assignment rule to confirm the steps of this process.

Task Category and Priority

The task will be available based on the phase and case type selected in the correlating drop downs below. Additionally, set the task priority for the assignment rule by entering a numerical value.

Phase*

Initiation

Case Type*

Select Case Type...

Set Task Priority*

Enter Task Priority...

Task Details

Assign the task to a role. Optionally set the number of days a case can remain in received status and/or, set the number of days the case may remain in the phase.

Assign to*

Any Capable User

Set Move Task Times*

15

Set Case Duration

45

Task Attributes

To associate specific criteria related to the assignment rule, include a specific program tag below.

Program Tag

Select Program Tag...

Cancel

Save

Steps 5 - 7

National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Dashboard

Task Management

Visit Management

Subject Management

Org Management

Order Form Library

System Settings

Reports

Error Management

Task Category and Priority

The task will be available based on the phase and case type selected in the correlating drop downs below. Additionally, set the task priority for the assignment rule by entering a numerical value.

Phase*

Select Phase...

Select Phase...

Initiation

Review

Authorization

Returned From ISP

Returned From Authorizer

Interim

Program Tag

Select Program Tag...

Case Type*

Select Case Type...

Select Case Type...

Any

National Agency Check

Reimbursable Suitability Investigation

Special Agreement Check

Tier 1

Tier 2

Tier 2 Reinvestigation

Tier 3

Tier 3 Reinvestigation

Tier 4

Tier 4 Reinvestigation

Tier 5

Tier 5 Reinvestigation

Set Task Priority*

60

Set Case Duration

Enter Case Duration...

A default number is provided but can be changed as needed. The lower the number determines the higher the priority for this task. The priority will be used to determine the order for processing.

Cancel

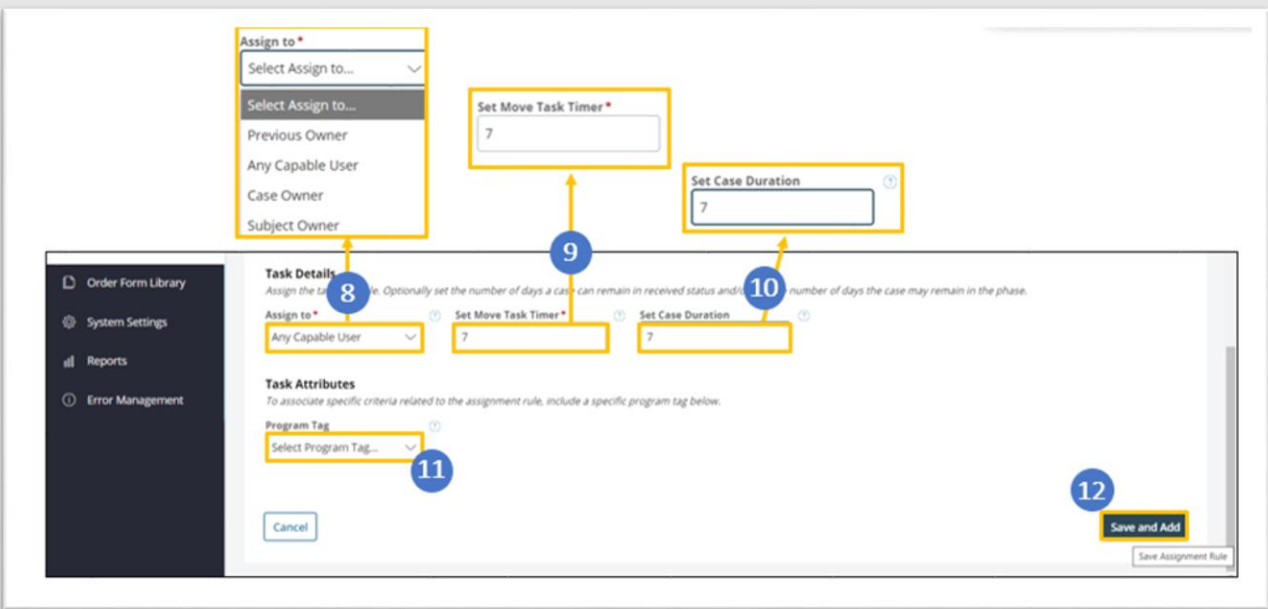
Save and Add



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JOB AID

Steps 8-12



The screenshot displays the NBIS Job Aid interface for configuring a task assignment rule. The interface includes a sidebar with navigation options: Order Form Library, System Settings, Reports, and Error Management. The main content area is divided into sections for Task Details and Task Attributes. Step 8 points to the 'Assign to *' dropdown menu, which is open, showing options: Select Assign to..., Previous Owner, Any Capable User, Case Owner, and Subject Owner. Step 9 points to the 'Set Move Task Timer *' input field, which contains the value '7'. Step 10 points to the 'Set Case Duration' input field, which also contains the value '7'. Step 11 points to the 'Program Tag' dropdown menu, which is open, showing the option 'Select Program Tag...'. Step 12 points to the 'Save and Add' button at the bottom right of the form. The 'Cancel' button is located at the bottom left of the form.

Task Details
Assign the task to a user. Optionally set the number of days a case can remain in received status and the number of days the case may remain in the phase.

Task Attributes
To associate specific criteria related to the assignment rule, include a specific program tag below.

Step 8: Assign to *
Select Assign to...
Previous Owner
Any Capable User
Case Owner
Subject Owner

Step 9: Set Move Task Timer *
7

Step 10: Set Case Duration
7

Step 11: Program Tag
Select Program Tag...

Step 12: Save and Add

Cancel

Save Assignment Rule



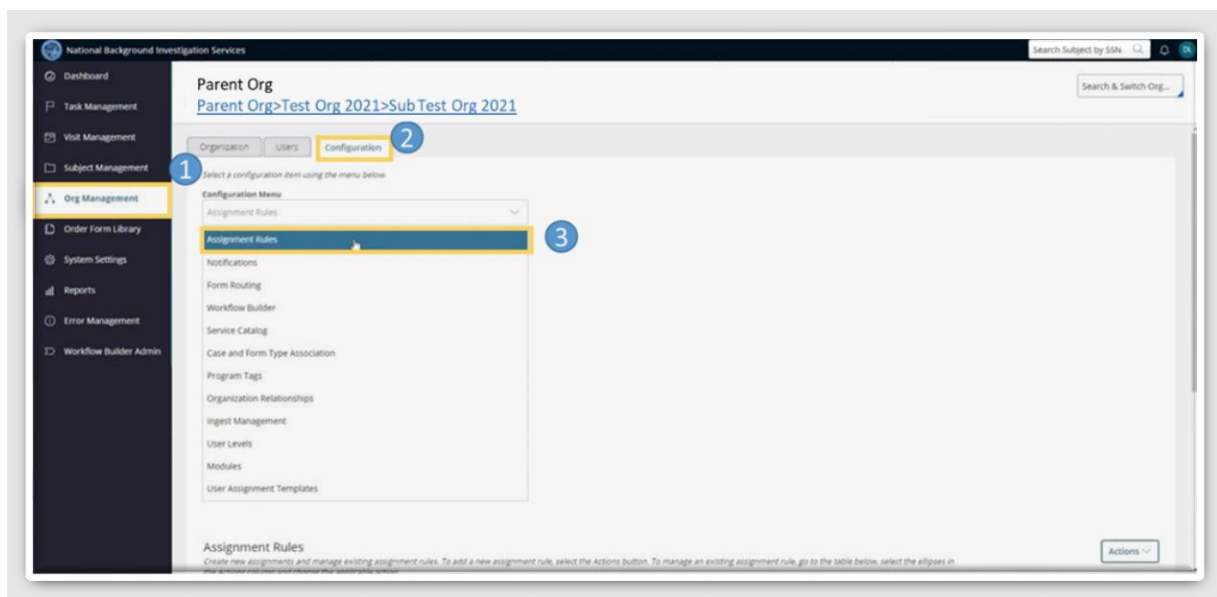
HOW TO EDIT/REPRIORTIZE ASSIGNMENT RULES

Purpose and Overview: Organizations can reprioritize the workload and the manner in which cases are assigned by modifying assignment rules.

Below is the 6-step process for how to edit & reprioritize an Assignment Rule:

1. From login, select **Org Management** from the Navigation Menu on the left.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
3. From the Configuration Menu, select **Assignment Rules**.
 - a. The screen will display a prioritized list of existing Assignment Rules. Within the list of Assignment Rules, locate the row you want to edit.
4. In the row that you want to edit, select the **ellipses** in the Actions column on that row. Select **View Details**.
5. Select **Edit**, then make any changes and select **Save** when completed.
6. From the Actions drop-down, select **Reprioritize** to apply changes in cases.
 - a. **Note:** Changes will not be applied to cases in flight that are already assigned to a user. By selecting Reprioritize, changes will be applied to all cases in flight not currently assigned to a user. If Reprioritize is not selected, changes made to assignment rules, including additions & deletion of rules, will be applied overnight.

Steps 1 – 3

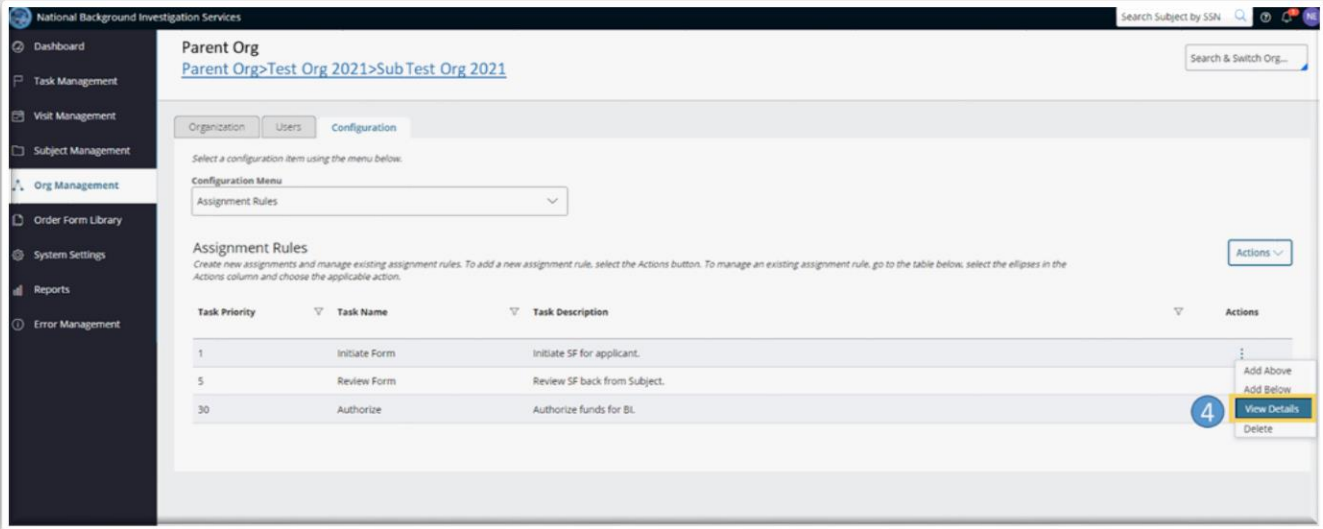




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 4



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

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)


Search & Switch Org...

Organization Users Configuration

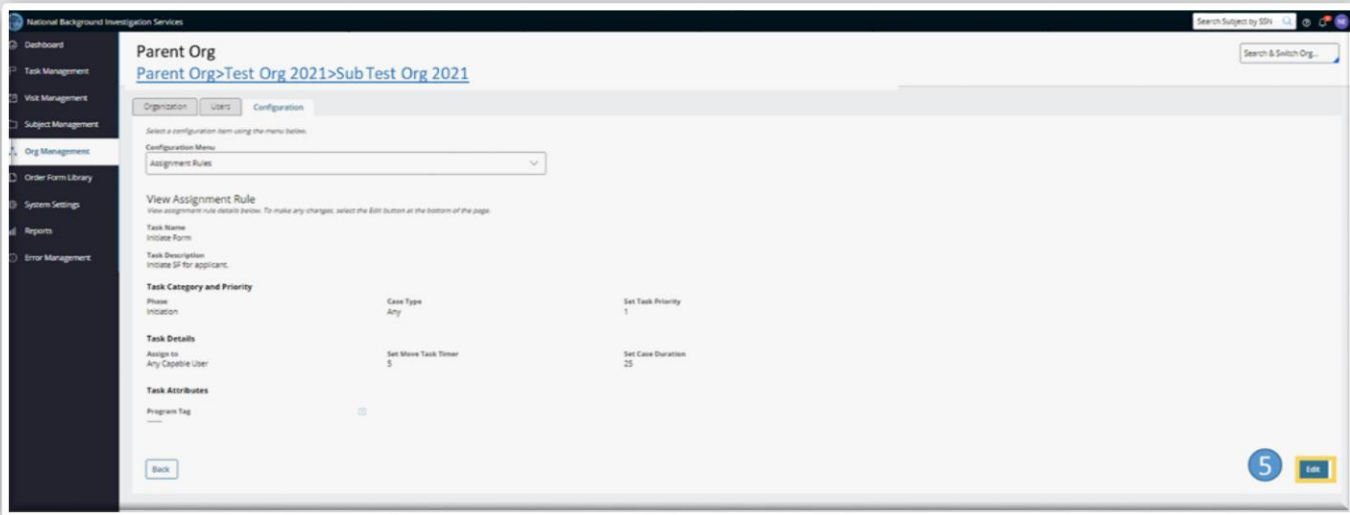
Select a configuration item using the menu below.

Configuration Menu
Assignment Rules

Assignment Rules
Create new assignments and manage existing assignment rules. To add a new assignment rule, select the Actions button. To manage an existing assignment rule, go to the table below, select the ellipses in the Actions column and choose the applicable action.

Task Priority	Task Name	Task Description	Actions
1	Initiate Form	Initiate SF for applicant.	 Add Above Add Below View Details Delete
5	Review Form	Review SF back from Subject.	
30	Authorize	Authorize funds for BL.	

Step 5



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

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Search & Switch Org...

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu
Assignment Rules

View Assignment Rule
View assignment rule details below. To make any changes, select the Edit button at the bottom of the page.

Task Name
Initiate Form

Task Description
Initiate SF for applicant.

Task Category and Priority

Phase	Case Type	Set Task Priority
Initiation	Any	1

Task Details

Assign to	Set Move Task Timer	Set Case Duration
Any Capable User	5	25

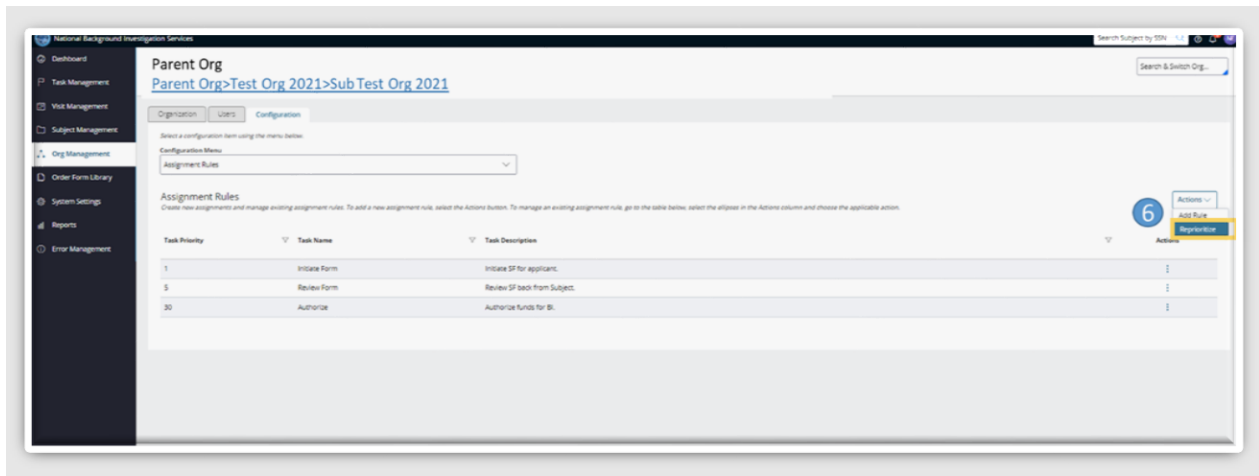
Task Attributes

Program Tag

Back



Step 6



HOW TO DELETE ASSIGNMENT RULES

Purpose and Overview: Assignment Rules can be deleted if no longer needed by the org. Deleted rules will no longer appear in the rules table in the Assignment Rules Configuration menu.

Below is the 6-step process for how to delete an Assignment Rule:

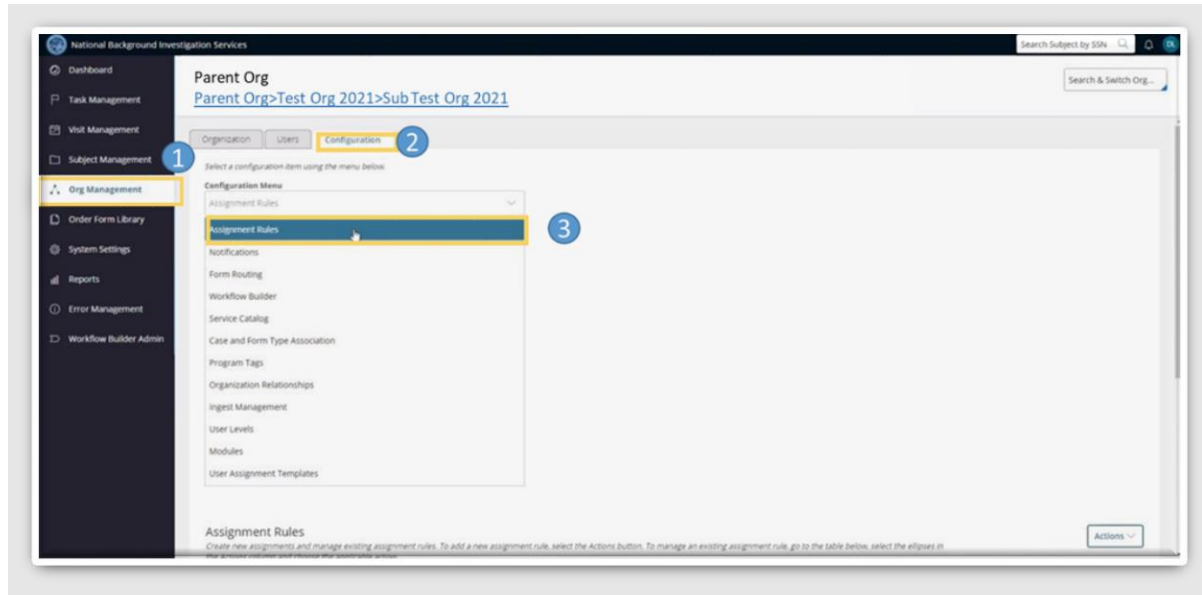
1. From log in, select **Org Management** from the Navigation Menu on the left.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
3. From the Configuration Menu, select **Assignment Rules**.
4. The screen will display a prioritized list of existing Assignment Rules. In the row of the Assignment Rule that you want to delete, select the **ellipses** under the Actions column.
5. You will be prompted with a mini screen showing four options. Select **Delete** to remove the desired rule.
6. Return to the list of existing Assignment Rules. Verify the Assignment Rule was successfully deleted by confirming that it does not appear in the new prioritized list of Assignment Rules.



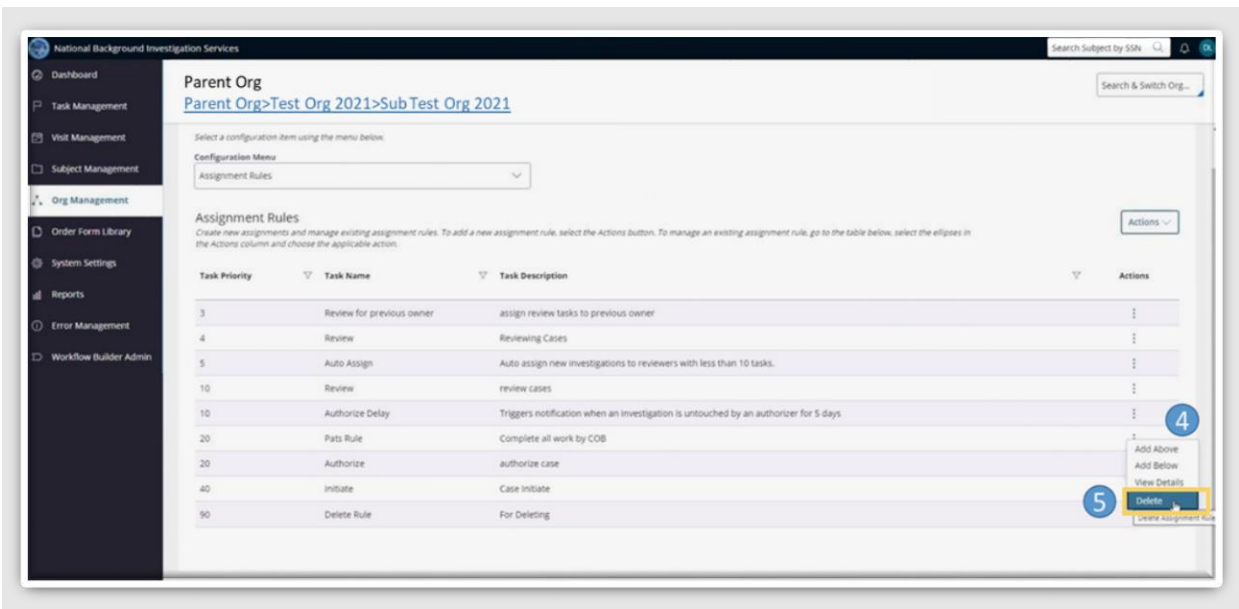
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JOB AID

Steps 1 -3



Steps 4-5

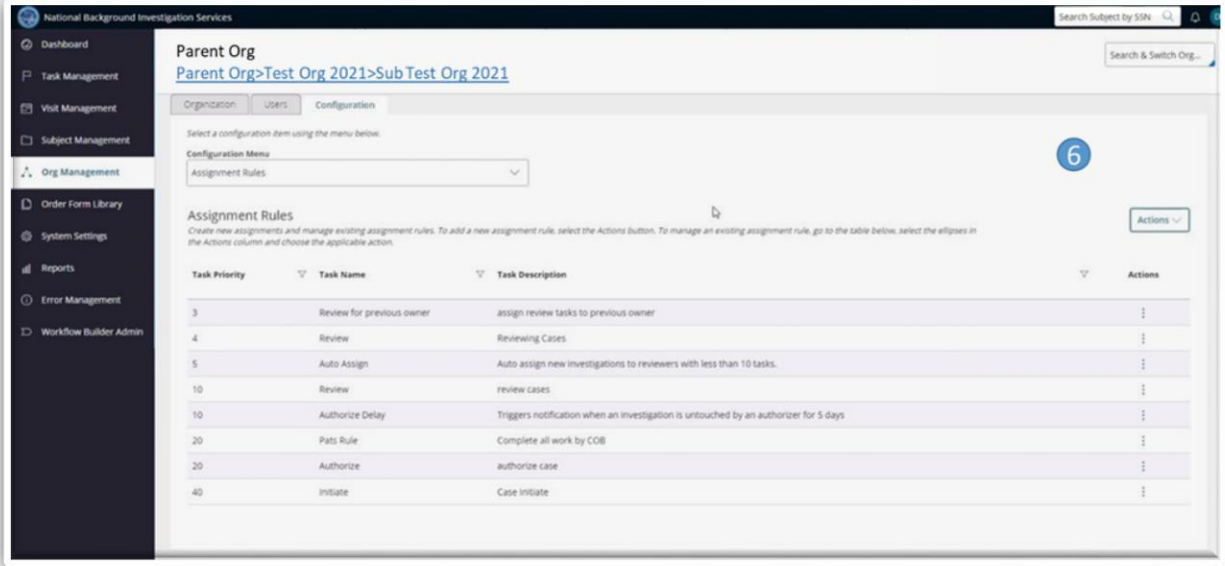




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JOB AID

Step 6



The screenshot shows the NBIS Job Aid interface for configuring Assignment Rules. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management (selected), Order Form Library, System Settings, Reports, Error Management, and Workflow Builder Admin. The main content area is titled 'Parent Org' and shows a breadcrumb trail: 'Parent Org > Test Org 2021 > Sub Test Org 2021'. Below this, there are tabs for 'Organization', 'Users', and 'Configuration'. The 'Configuration' tab is active, and a 'Configuration Menu' dropdown is set to 'Assignment Rules'. A blue circle with the number '6' is in the top right corner of the main content area. Below the menu, there is a section titled 'Assignment Rules' with a description: 'Create new assignments and manage existing assignment rules. To add a new assignment rule, select the Actions button. To manage an existing assignment rule, go to the table below, select the ellipses in the Actions column and choose the applicable action.' A table lists the assignment rules with columns for Task Priority, Task Name, Task Description, and Actions.

Task Priority	Task Name	Task Description	Actions
3	Review for previous owner	assign review tasks to previous owner	⋮
4	Review	Reviewing Cases	⋮
5	Auto Assign	Auto assign new investigations to reviewers with less than 10 tasks.	⋮
10	Review	review cases	⋮
10	Authorize Delay	Triggers notification when an investigation is untouched by an authorizer for 5 days	⋮
20	Pato Rule	Complete all work by COB	⋮
20	Authorize	authorize case	⋮
40	Initiate	Case Initiate	⋮



NOTIFICATIONS

User Role Required: Notification Manager. The Notification Manager is responsible for creating, customizing, and managing criteria for automatic alerts that can be used throughout the lifecycle of a case as well as for organization migrations.

Purpose and Overview: Organizations can set notifications to alert users and subjects of case status as it moves through the workflow. Notifications can be used as a tool to monitor, track, and prompt action on cases. Notifications are delivered internally via the bell icon and by email. Email notifications will display only the information provided. No links to cases are provided. Notifications cannot be sent to external users or organizations.

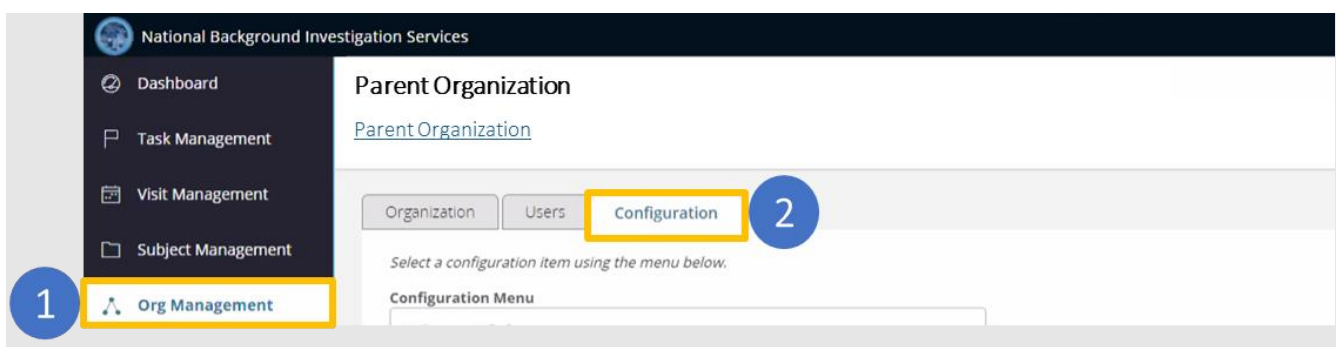
Notifications are an **optional** configuration. It is recommended that orgs add a Status/Assignment Notification for Returned from ISP to enable the org to view updates.

HOW TO VIEW ORGANIZATION NOTIFICATIONS

Purpose and Overview: Notification Managers can view org notifications in NBIS. Listed below is the 5-step process for how to view Notifications:

1. From initial log in, select **Org Management** from the Navigation Menu on the left.
2. Navigate to your org (if needed) then select the **Configuration** tab.
3. From the Configuration menu, select **Notifications**.
4. After selecting Notifications from the drop-down, users will now be able to see the full list of existing notifications for the organization that they are logged into.
5. To view the details of a specific notification, search for and locate that notification using the Notification Name column. Select the **Notification Name** hyperlink to open the details of the selected notification.

Steps 1-2

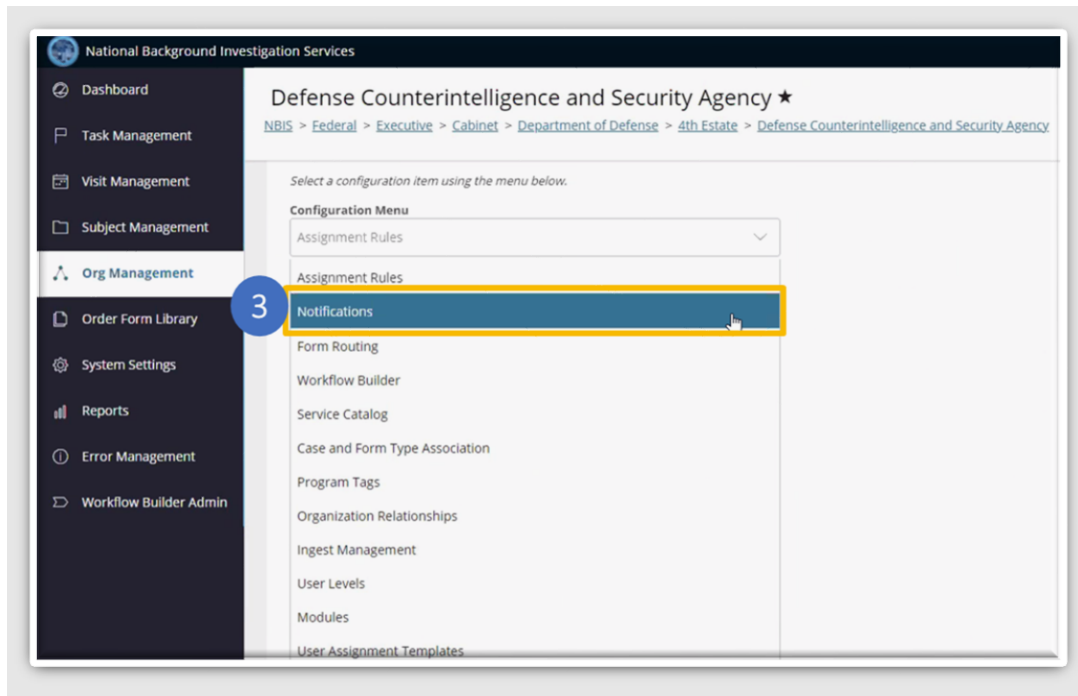




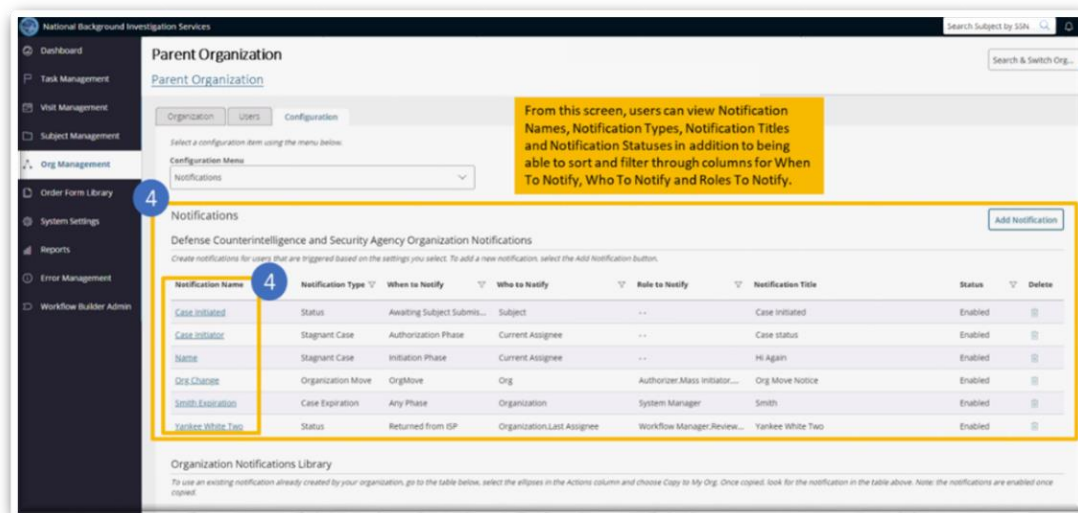
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 3

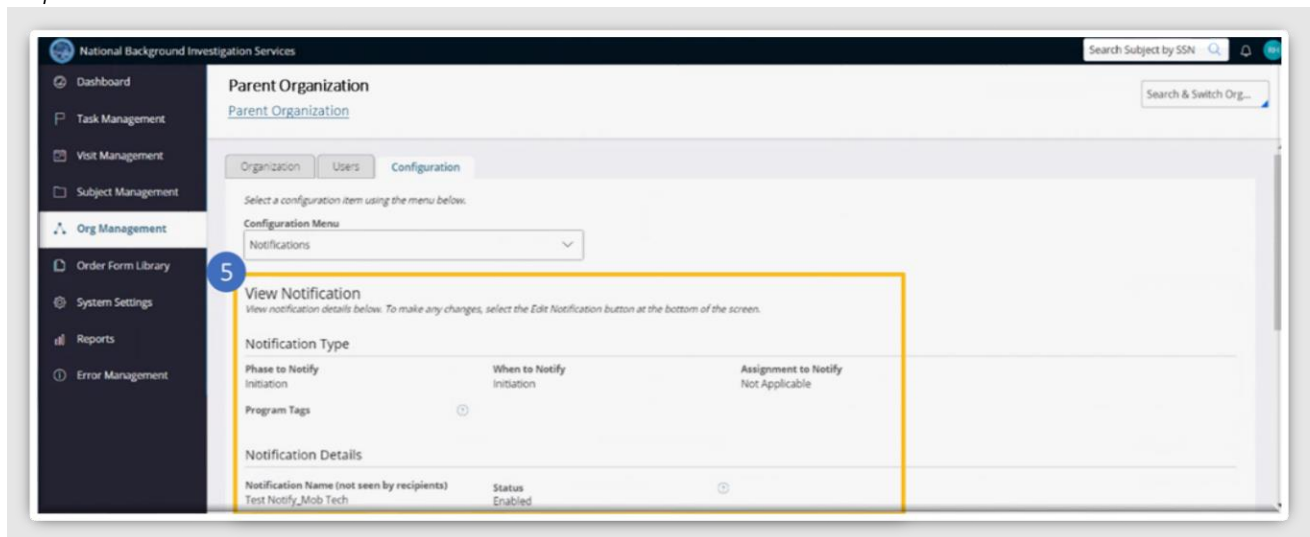


Step 4





Step 5



HOW TO COPY NOTIFICATIONS

Purpose and Overview: Notifications can be inherited by all orgs within the hierarchy if the option is enabled in the Parent Org. Notification Managers can also copy existing notifications from the Organization Notifications Library to their organization.

Below outlines the 6-step process for copying Notifications:

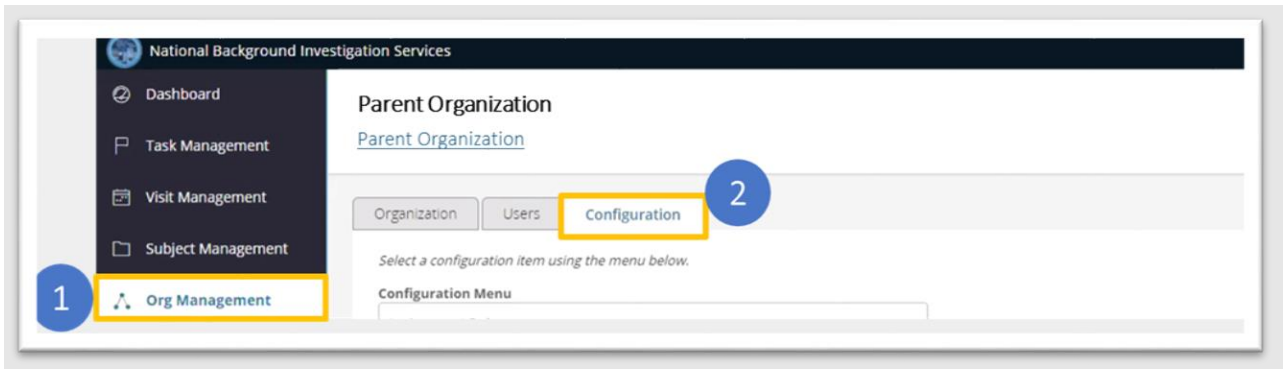
1. From initial log in, select **Org Management** from the Navigation Menu on the left.
2. Navigate to your organization (if needed) then select the **Configuration** tab.
3. From the Configuration menu, select **Notifications**. After selecting Notifications from the drop-down, users will now be able to see the full list of existing notifications for the organization that they are logged into.
4. Scroll down to the Organization Notifications Library section. Locate the notification you want to copy to your organization and select the **“Copy to My Organization”** button to add that notification to the organization you are signed into.
6. Scroll back up to view the list of existing notifications for the organization that you are signed into. You should now see the notification that you copied within the list of existing notifications for your organization.



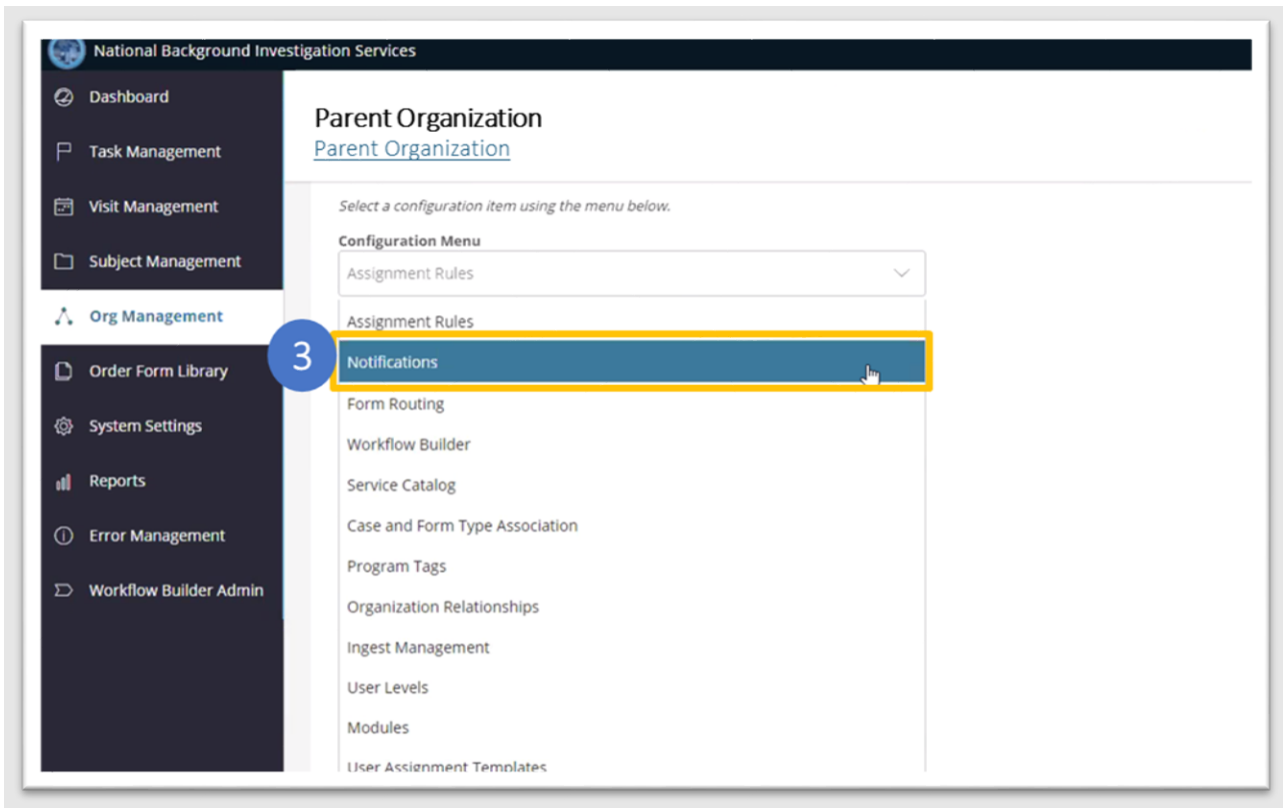
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Steps 1-2



Step 3

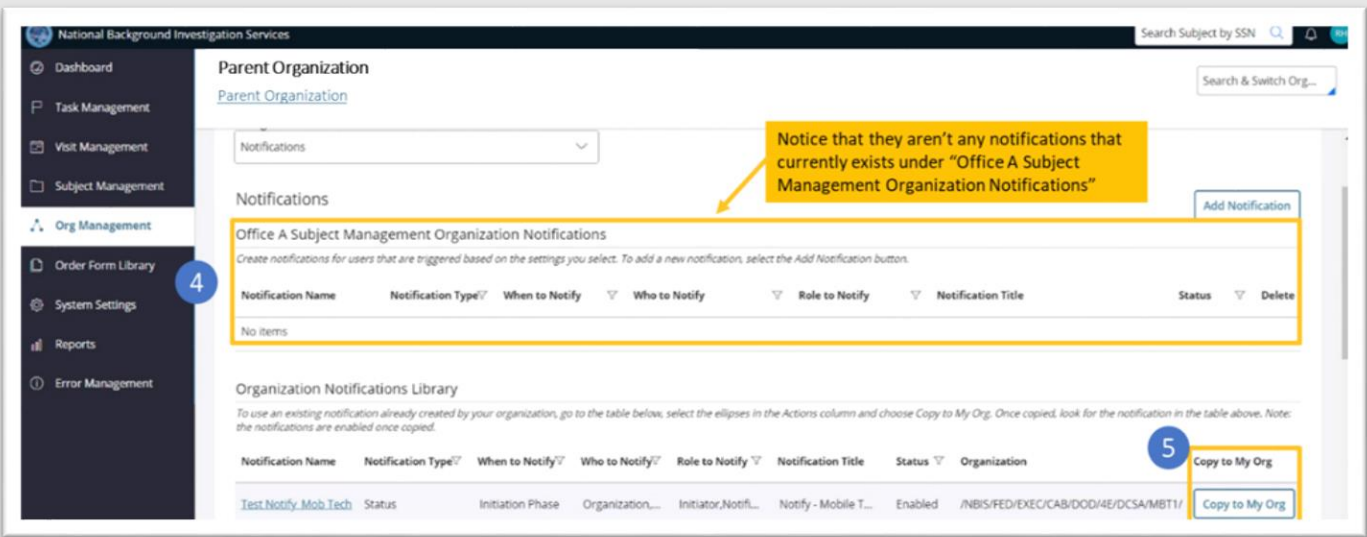




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 4-5



Parent Organization

Notifications

Office A Subject Management Organization Notifications

Create notifications for users that are triggered based on the settings you select. To add a new notification, select the Add Notification button.

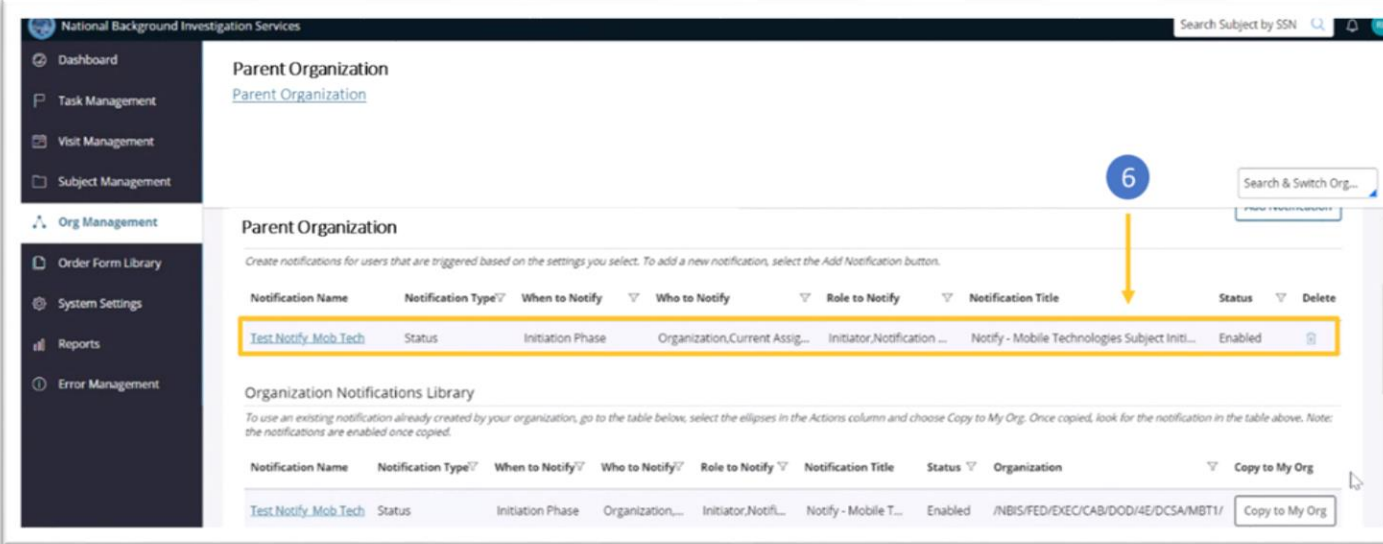
Notification Name	Notification Type	When to Notify	Who to Notify	Role to Notify	Notification Title	Status	Delete
No items							

Organization Notifications Library

To use an existing notification already created by your organization, go to the table below, select the ellipses in the Actions column and choose Copy to My Org. Once copied, look for the notification in the table above. Note: the notifications are enabled once copied.

Notification Name	Notification Type	When to Notify	Who to Notify	Role to Notify	Notification Title	Status	Organization	Copy to My Org
Test.Notify_Mob.Tech	Status	Initiation Phase	Organization,...	Initiator,Notif...	Notify - Mobile T...	Enabled	/NBIS/FED/EXEC/CAB/DOD/4E/DCSA/MBT1/	Copy to My Org

Step 6



Parent Organization

Notifications

Office A Subject Management Organization Notifications

Create notifications for users that are triggered based on the settings you select. To add a new notification, select the Add Notification button.

Notification Name	Notification Type	When to Notify	Who to Notify	Role to Notify	Notification Title	Status	Delete
Test.Notify_Mob.Tech	Status	Initiation Phase	Organization,Current Assig...	Initiator,Notification ...	Notify - Mobile Technologies Subject Initi...	Enabled	

Organization Notifications Library

To use an existing notification already created by your organization, go to the table below, select the ellipses in the Actions column and choose Copy to My Org. Once copied, look for the notification in the table above. Note: the notifications are enabled once copied.

Notification Name	Notification Type	When to Notify	Who to Notify	Role to Notify	Notification Title	Status	Organization	Copy to My Org
Test.Notify_Mob.Tech	Status	Initiation Phase	Organization,...	Initiator,Notif...	Notify - Mobile T...	Enabled	/NBIS/FED/EXEC/CAB/DOD/4E/DCSA/MBT1/	Copy to My Org



HOW TO ADD STATUS/ASSIGNMENT NOTIFICATIONS

Purpose and Overview: Status/Assignment notifications can be created to alert users when the case request moves to a different status within a workflow and when a case is assigned to a user or workbasket depending on the phase.

Organizations can create status/assignment notifications according to need. It is recommended that a "Return from ISP" notification be created to promptly address issues or take action.

Below is the 10-step process to add Status/Assignment Notifications:

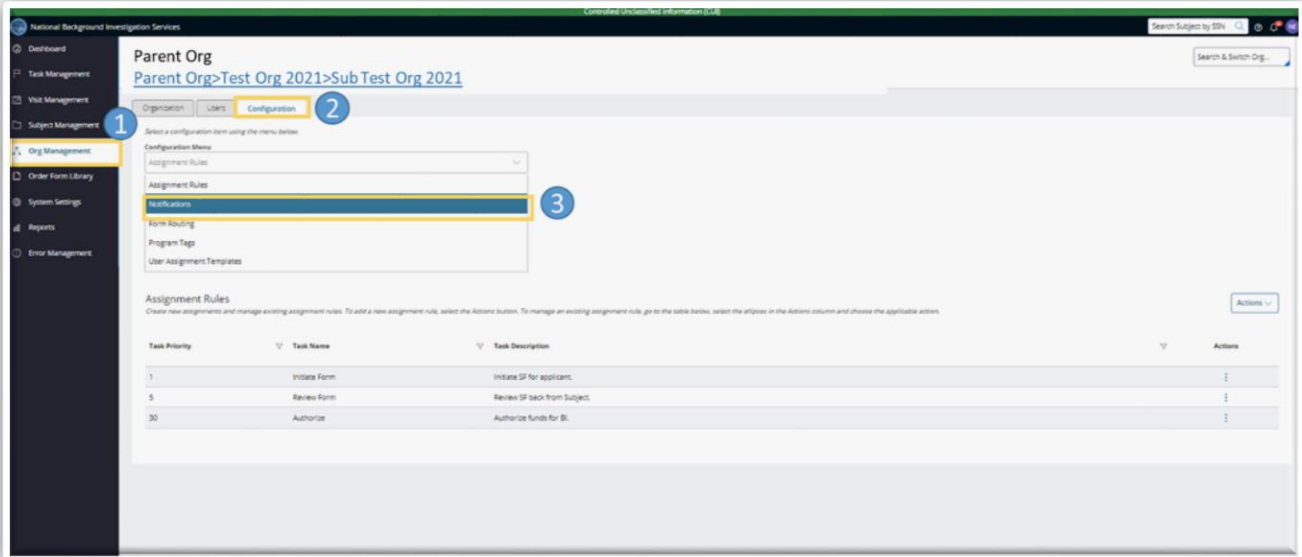
1. From initial log in, select the **Org Management** tab from the navigation menu on the left.
2. Switch to the designated org (if needed) and select the **Configuration** tab.
3. From the Configuration Menu, select **Notifications**.
4. To create a new notification, click the Add Notification button on the far-right side of the screen.
5. Select **Phase to Notify** to identify which phase the status/assignment notification is applicable to.
6. For the Notification Type, select **Status/Assignment**.
7. **When to Notify** chooses the specific status for notifications. Select an option for When to Notify from the drop-down menu.
 - a. A field for 'Assignment to Notify' may appear depending on what is selected for When to Notify. Select an option for **Assignment to Notify** if it appears as a required field. Selecting a Program Tag is optional.
8. Users can proceed to **Notification Details**. Enter the **Notification Name**, make sure the Status box is checked (enabled). Select options for '**Who to Notify**' using the drop-down menus for each field.
 - a. **Note:** If organization is selected as a "Who to Notify" option, an additional field requiring the roles within the organization to notify will populate.
9. Complete Message to Recipients, Title of Notification to Recipients, and Message Text Editor fields.
 - a. **Note:** Variables are provided below the Message Text Editor to allow for case specific data to be incorporated into an otherwise standardized notification message.
10. Select **Save** and **Add**.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1-3



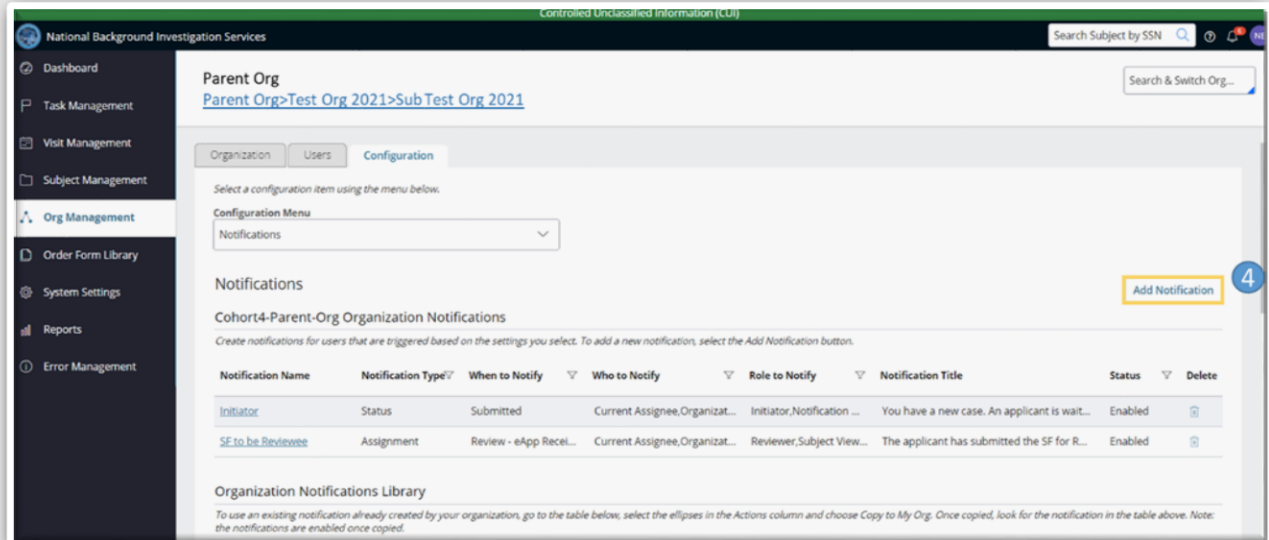
Parent Org
Parent Org>Test Org 2021>Sub Test Org 2021

Configuration Menu

Assignment Rules

Task Priority	Task Name	Task Description	Actions
1	Initiate Form	Initiate SF for applicant.	
5	Review Form	Review SF back from Subject.	
30	Authorize	Authorize funds for BL.	

Step 4



Parent Org
Parent Org>Test Org 2021>Sub Test Org 2021

Configuration Menu

Notifications

Add Notification

Cohort4-Parent-Org Organization Notifications

Create notifications for users that are triggered based on the settings you select. To add a new notification, select the Add Notification button.

Notification Name	Notification Type	When to Notify	Who to Notify	Role to Notify	Notification Title	Status	Delete
Initiator	Status	Submitted	Current Assignee, Organizat...	Initiator, Notification ...	You have a new case. An applicant is wait...	Enabled	
SF to be Reviewed	Assignment	Review - eApp Recei...	Current Assignee, Organizat...	Reviewer, Subject View...	The applicant has submitted the SF for R...	Enabled	

Organization Notifications Library

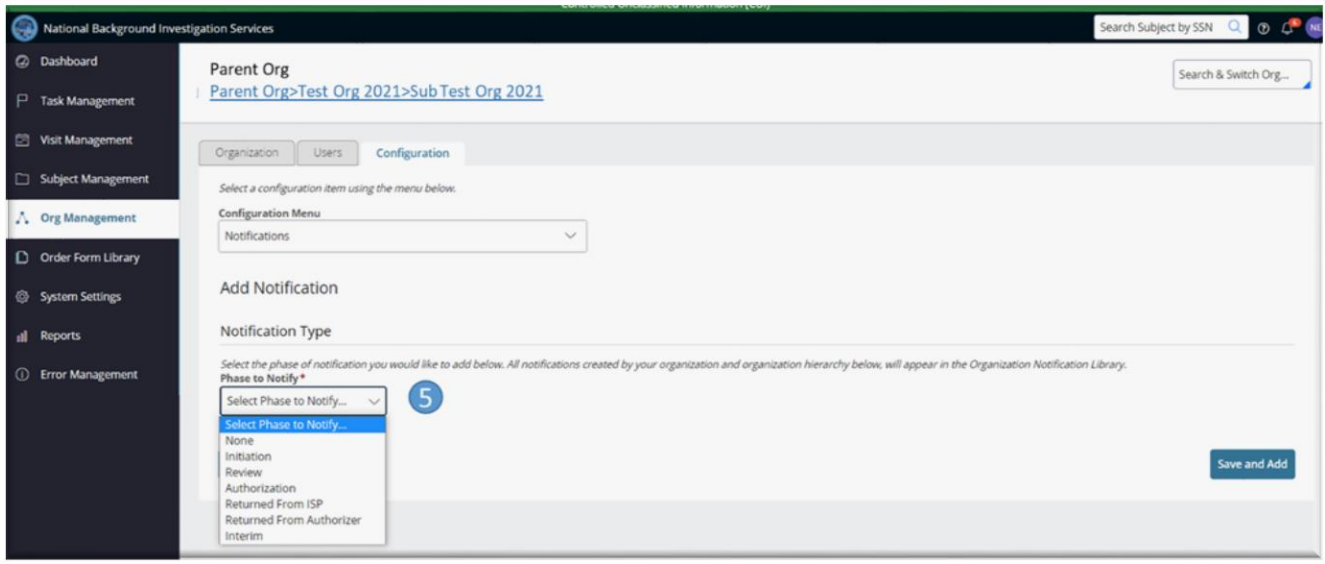
To use an existing notification already created by your organization, go to the table below, select the ellipses in the Actions column and choose Copy to My Org. Once copied, look for the notification in the table above. Note: the notifications are enabled once copied.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

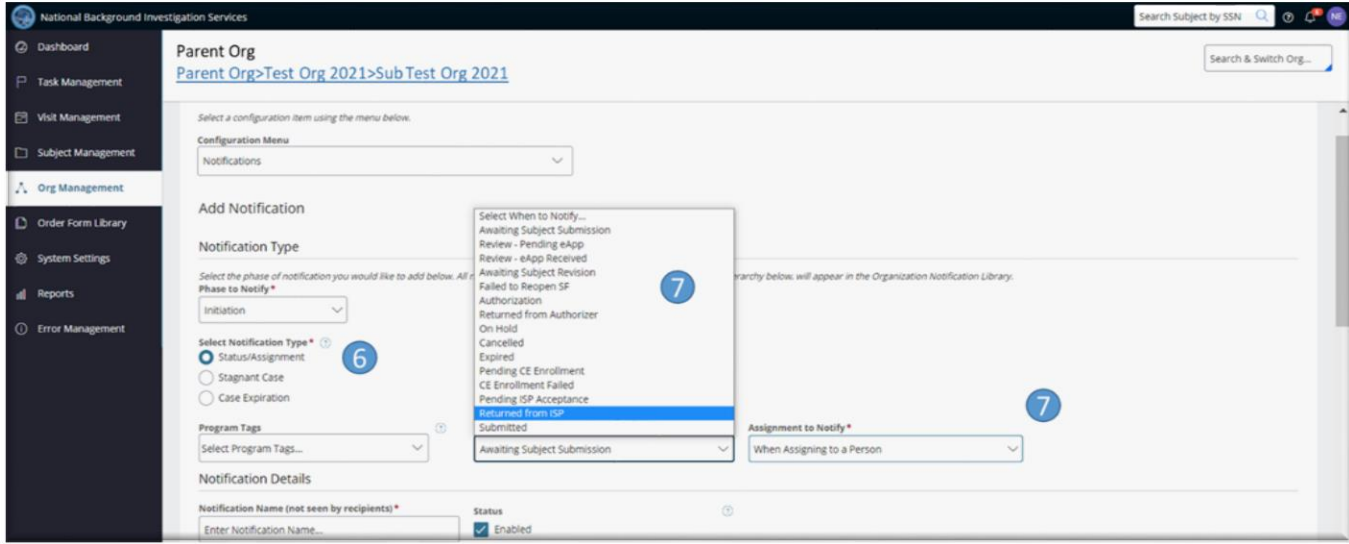
JOB AID

Step 5



The screenshot shows the NBIS web application interface. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management (highlighted), Order Form Library, System Settings, Reports, and Error Management. The main content area is titled "Parent Org" and shows a breadcrumb trail: "Parent Org > Test Org 2021 > Sub Test Org 2021". Below this, there are tabs for "Organization", "Users", and "Configuration". The "Configuration" tab is active, and a dropdown menu for "Configuration Menu" is open, showing "Notifications". A "Select a configuration item using the menu below:" instruction is present. Below this, there is a "Add Notification" section. The "Notification Type" dropdown is open, showing a list of options: "None", "Initiation", "Review", "Authorization", "Returned From ISP", "Returned From Authorizer", and "Interim". A blue circle with the number "5" is next to the "Select Phase to Notify..." dropdown. A "Save and Add" button is at the bottom right.

Steps 6-7



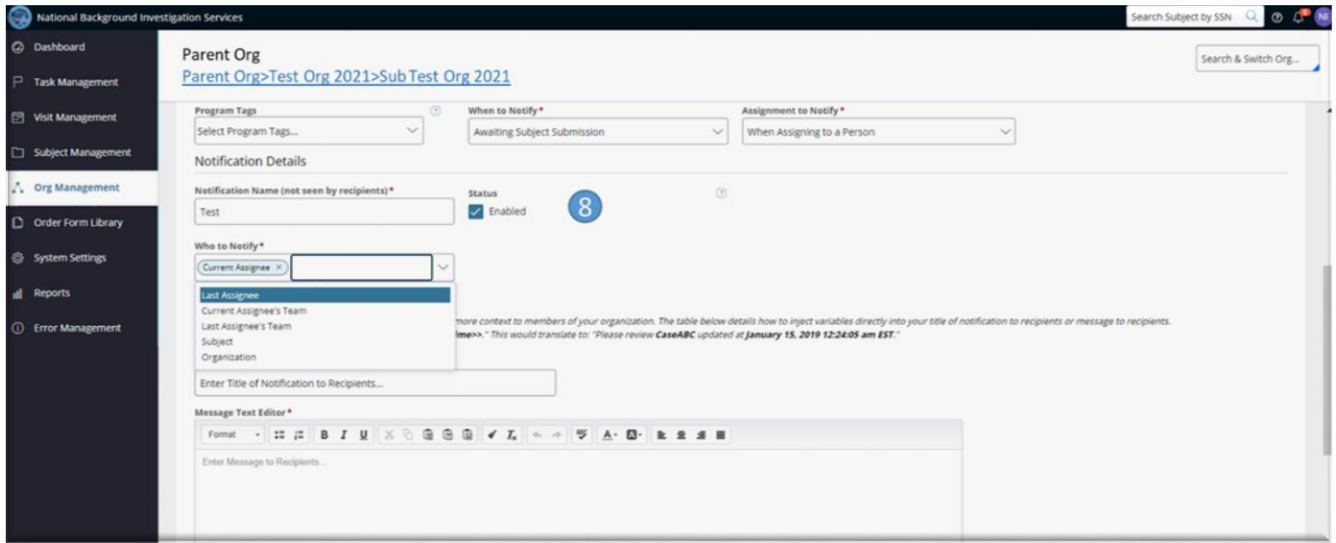
The screenshot shows the NBIS web application interface, continuing from Step 5. The "Add Notification" section is now expanded. The "Notification Type" dropdown is set to "Initiation". The "Select Notification Type" section has three radio buttons: "Status/Assignment" (selected), "Stagnant Case", and "Case Expiration". A blue circle with the number "6" is next to the "Status/Assignment" radio button. The "Program Tags" dropdown is open, showing a list of options: "Awaiting Subject Submission", "Review - Pending eApp", "Review - eApp Received", "Awaiting Subject Revision", "Failed to Reopen SP", "Authorization", "Returned from Authorizer", "On Hold", "Cancelled", "Expired", "Pending CE Enrollment", "CE Enrollment Failed", "Pending ISP Acceptance", "Returned from ISP", "Submitted", and "Awaiting Subject Submission". A blue circle with the number "7" is next to the "Returned from ISP" option. The "Assignment to Notify" dropdown is open, showing a list of options: "When Assigning to a Person". A blue circle with the number "7" is next to the "When Assigning to a Person" option. The "Notification Details" section is at the bottom, with a "Notification Name (not seen by recipients)" field and a "Status" dropdown set to "Enabled".



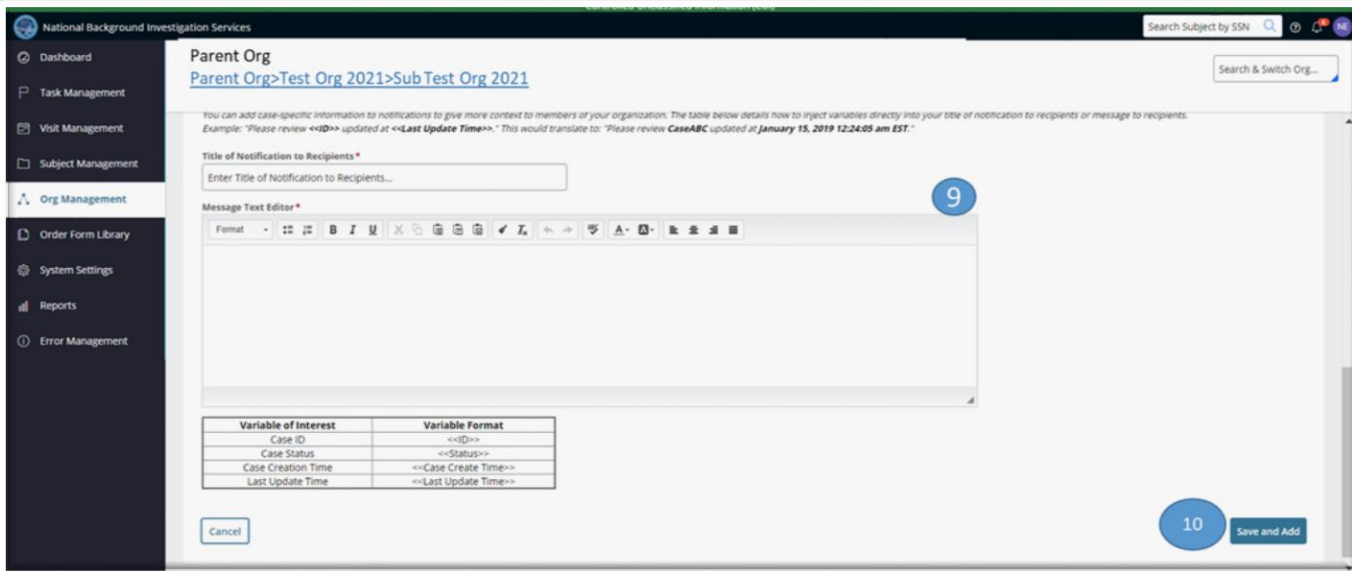
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 8



Steps 9-10



Variable of Interest	Variable Format
Case ID	<<ID>>
Case Status	<<Status>>
Case Creation Time	<<Case Create Time>>
Last Update Time	<<Last Update Time>>



HOW TO ADD STAGNANT CASE NOTIFICATIONS

Purpose and Overview: Stagnant Case Notifications can be configured to alert users when no action has been taken on a case or when a case request has been delayed in a certain phase for a specific amount of time. Stagnant Case Notifications are used to prompt users or subjects to take action.

Within each Stagnant Case Notification, users have the option to schedule 3 instances of notifications (1st, 2nd, and 3rd).

Below outlines the 14-step process for adding a Stagnant Case Notification:

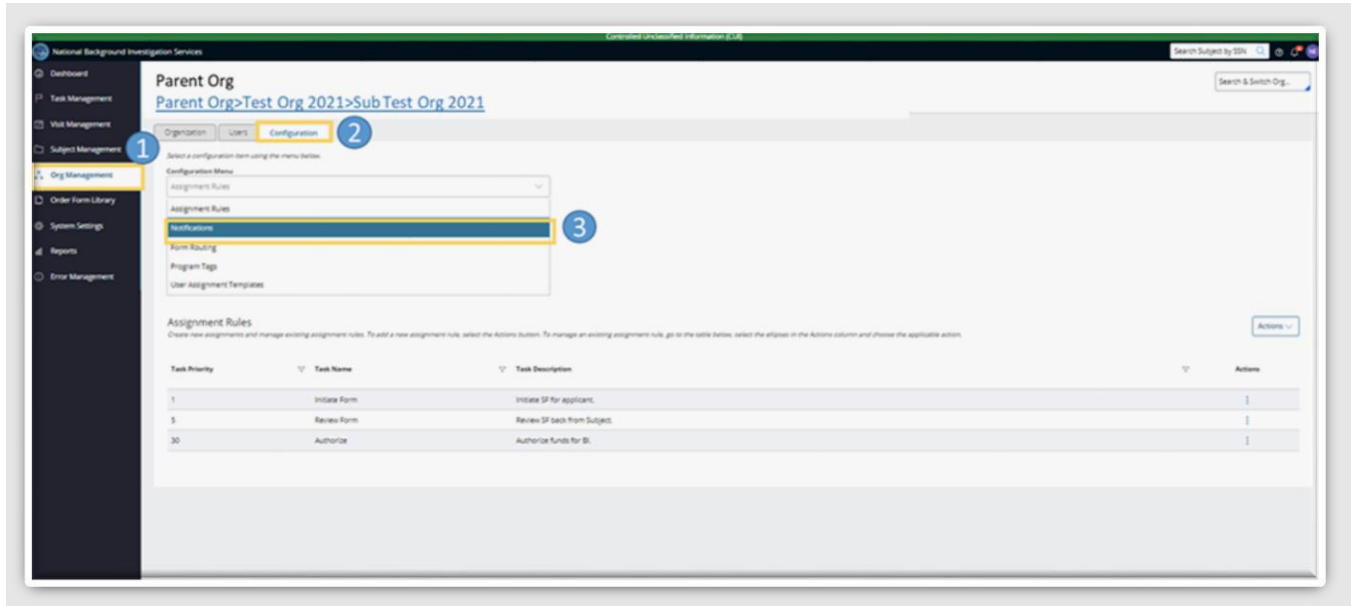
5. From initial log in, access the [Org Management](#) tab from the navigation menu on the left.
6. Switch to the designated org (if needed) and select the Configuration tab.
7. From the Configuration Menu, select [Notifications](#).
8. To create a new notification, click the [Add Notification](#) button on the far-right side of the screen.
9. Select [Phase to Notify](#) to identify which phase the status/assignment notification is applicable to.
10. For the Notification Type, select [Stagnant Case](#) from the options provided.
11. Select an option for “[When to Notify](#)” field. It is optional to select a Program Tag.
12. Proceed to [Notification Details](#). Enter a [Notification Name](#) by typing into the Notification Name field. Enabled is automatically checked for the Status. If unchecked, the notification built will not be sent for any cases meeting the notification parameters.
13. For the [first notification reminder](#), click the arrow in the “Who to Notify” field and select an option from the choices provided. Enter a numerical value for the “Days Before Notification” field to specify the amount of time the case can be stagnant before the notification is sent.
 - a. If “Organization” is selected for the 1st, 2nd or 3rd notification reminder, users will be required to select options for the “Roles to Notify” field. Select the appropriate role(s).
14. For the [second notification reminder](#), click the arrow in the “Who to Notify” field and select an option from the choices provided. Enter a numerical value for the “Days After First Notification” field.
15. If configuring the [third notification reminder](#) (optional), it is pre-set to send the notification every 15 days for a maximum of 4 times, or until the case is moved out of the specific phase. Only the “Who to Notify” field needs to be completed if the third notification is being utilized.
16. Proceed to the [Message to Recipients](#) section. This will enable case-specific information for notifications to provide more details to the members of the organization. Add a title for the “Title of Notification to Recipients” field.
17. Include a message in the “[Message Text Editor](#).” The table below this field shows how to use variables within the Title of Notification or Message Text Editor fields.
18. Select [Save and Add](#).



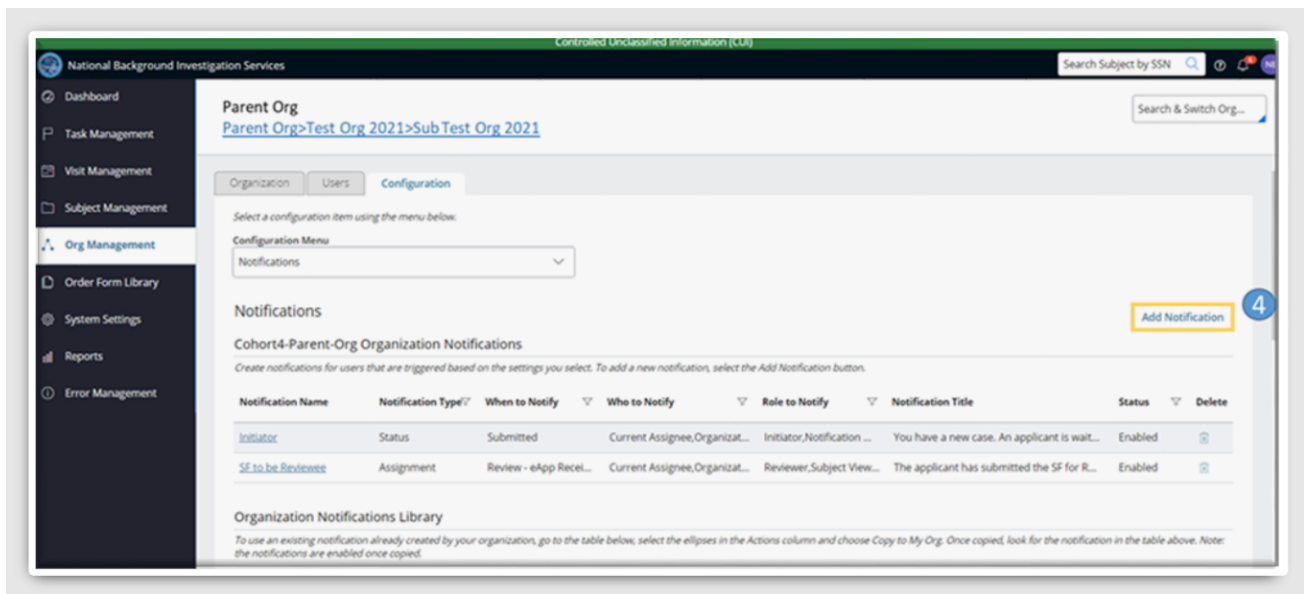
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

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Steps 1-3



Step 4

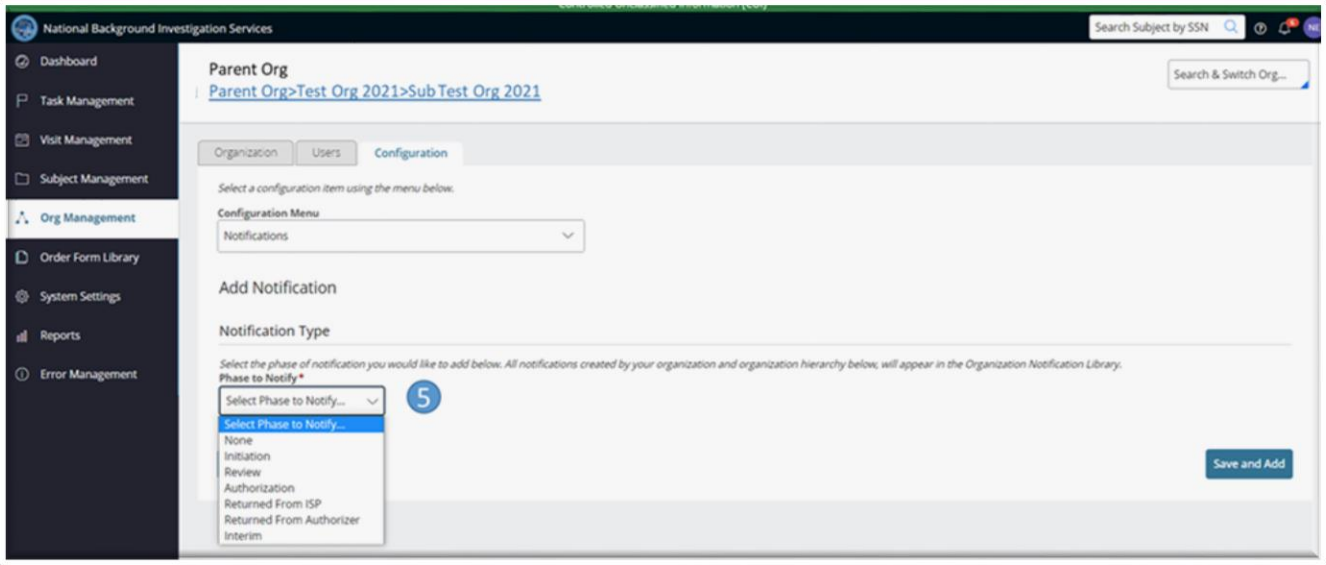




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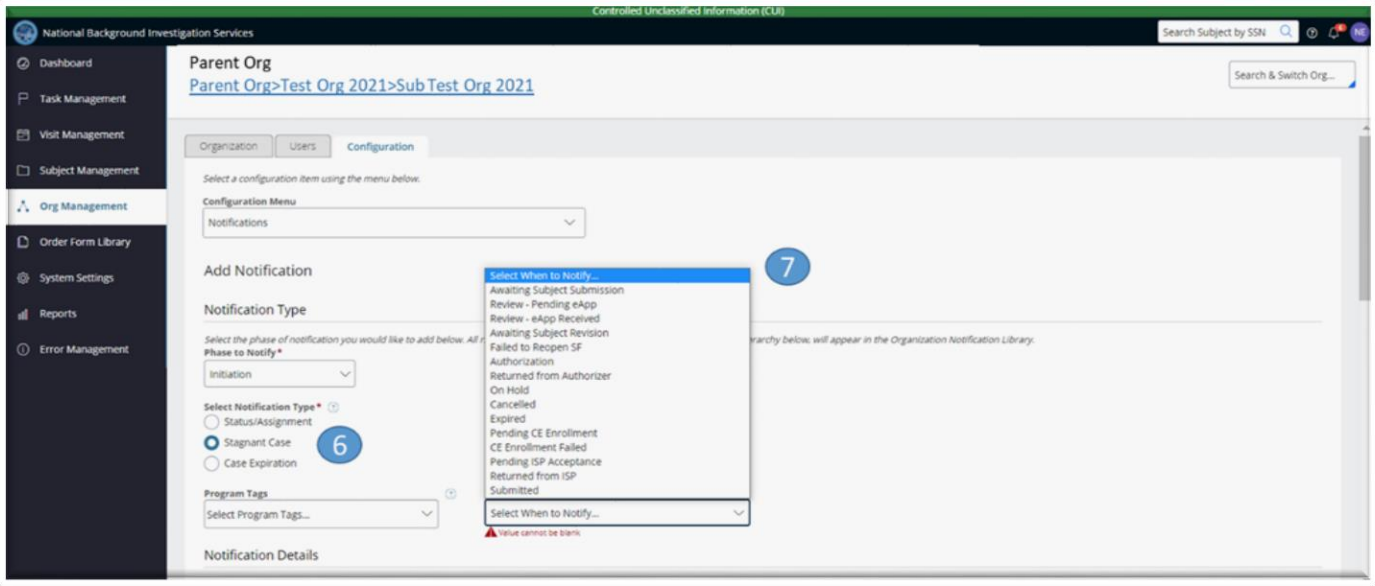
JOB AID

Step 5



The screenshot shows the NBIS web application interface. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management (highlighted), Order Form Library, System Settings, Reports, and Error Management. The main content area is titled "Parent Org" and shows a breadcrumb trail: "Parent Org > Test Org 2021 > Sub Test Org 2021". Below this, there are tabs for "Organization", "Users", and "Configuration". The "Configuration" tab is active, and a "Configuration Menu" dropdown is set to "Notifications". The "Add Notification" section is visible, with a "Notification Type" dropdown menu open. The dropdown menu lists several options: "Select Phase to Notify...", "None", "Initiation", "Review", "Authorization", "Returned From ISP", "Returned From Authorizer", and "Interim". A blue circle with the number "5" is placed next to the "Select Phase to Notify..." option. A "Save and Add" button is located at the bottom right of the "Add Notification" section.

Steps 6-7



The screenshot shows the NBIS web application interface, continuing from Step 5. The "Add Notification" section is still active. The "Notification Type" dropdown menu is now set to "Initiation". A blue circle with the number "6" is placed next to the "Initiation" option. The "Select Notification Type" section is visible, with radio buttons for "Status/Assignment", "Stagnant Case" (selected), and "Case Expiration". A blue circle with the number "7" is placed next to the "Stagnant Case" option. The "Program Tags" dropdown menu is open, showing a list of tags: "Awaiting Subject Submission", "Review - Pending eApp", "Review - eApp Received", "Awaiting Subject Revision", "Failed to Reopen SF", "Authorization", "Returned from Authorizer", "On Hold", "Cancelled", "Expired", "Pending CE Enrollment", "CE Enrollment Failed", "Pending ISP Acceptance", "Returned from ISP", and "Submitted". A blue circle with the number "7" is placed next to the "Select When to Notify..." option. A "Save and Add" button is located at the bottom right of the "Add Notification" section.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 8-10

National Background Investigation Services

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Select the phase of notification you would like to add below. All notifications created by your organization and organization hierarchy below, will appear in the Organization Notification Library.

Phase to Notify*

Initiation

Select Notification Type *

☐ Status/Assignment

☒ Stagnant Case

☐ Case Expiration

Program Tags

Select Program Tags...

When to Notify *

Review - eApp Received

Notification Details

Notification Name (not seen by recipients)*

Test

Status

☒ Enabled

8

First Notification

Who to Notify *

Select Who to Notify...

Days Before Notification *

Enter Days B

9

Second Notification

Who to Notify

Select Who to Notify...

Days After First Notification

Enter Days A

10

Steps 11-12

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Search & Switch Org...

Third Notification

Who to Notify

Select Who to Notify...

11

Message to Recipients

You can add case-specific information to notifications to give more context to members of your organization. The table below details how to inject variables directly into your title of notification to recipients or message to recipients. Example: "Please review <<ID>> updated at <<Last Update Time>>." This would translate to: "Please review CaseABC updated at January 15, 2019 12:24:05 am EST."

Title of Notification to Recipients *

Enter Title of Notification to Recipients...

12

Message Text Editor *

Format

B I U

Variable of Interest

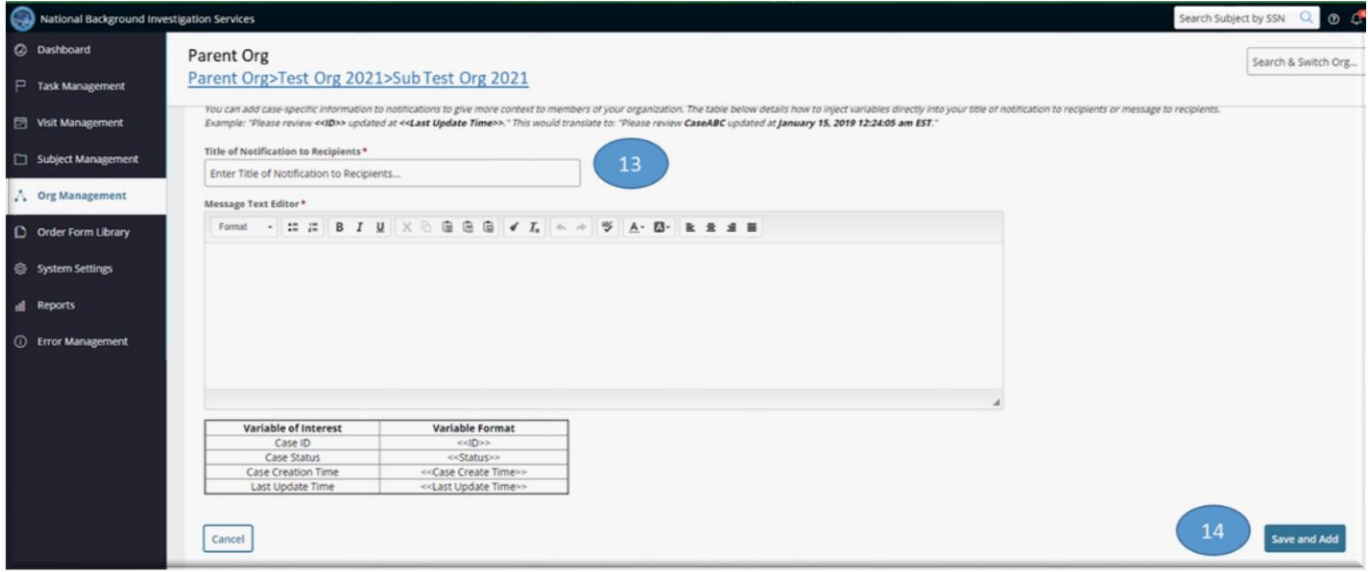
Variable of Interest	Variable Format
Case ID	<<ID>>
Case Status	<<Status>>
Case Creation Time	<<Case Create Time>>



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Steps 13-14



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Parent Org

Parent Org > Test Org 2021 > Sub Test Org 2021

You can add case-specific information to notifications to give more context to members of your organization. The table below details how to inject variables directly into your title or notification to recipients or message to recipients.
Example: "Please review <<ID>> updated at <<Last Update Time>>." This would translate to: "Please review CaseABC updated at January 15, 2019 12:24:05 am EST."

Title of Notification to Recipients *

Enter Title of Notification to Recipients...

Message Text Editor *

Format

Variable of Interest	Variable Format
Case ID	<<ID>>
Case Status	<<Status>>
Case Creation Time	<<Case Create Time>>
Last Update Time	<<Last Update Time>>

Cancel

Save and Add



HOW TO ADD CASE EXPIRATION NOTIFICATIONS

Purpose and Overview: Case Expiration Notifications set the timing for how long cases remain active within a phase after the Standard Form (SF) is received in the system. Users can send a case expiration reminder by entering the number of days a reminder will be sent before the case expiration.

Below outlines the 11-step process to add Case Expiration Notifications:

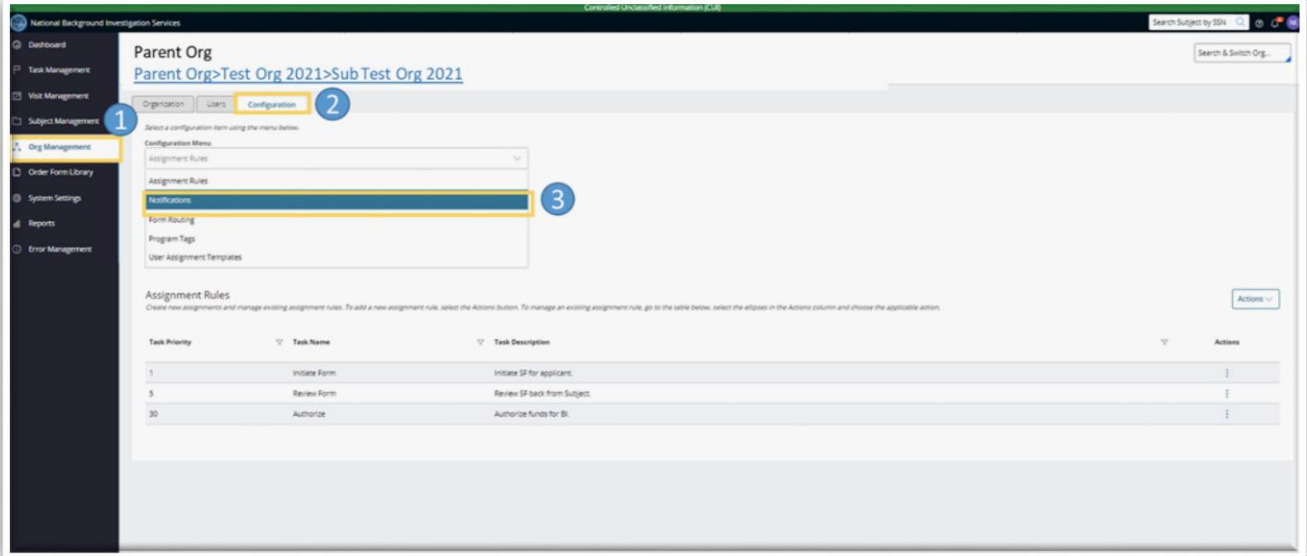
1. From log in select **Org Management**.
2. Switch to the designated org (if needed) then select the **Configuration** tab.
3. From the Configuration Menu, select **Notifications**.
4. To create a new notification, click the **Add Notification** button on the far-right side of the screen.
5. Select an option for the “**Phase to Notify**” to identify which phase the notification is applicable to.
6. For the Notification Type, select **Case Expiration** from the options provided.
7. Enter a **Notification Name**. Make sure Enabled is checked for the Status. If unchecked, the notification being built will not be sent.
8. For “**Who to Notify**”, select option(s) from the drop-down menu.
 - a. **Note:** If organization is selected as a “Who to Notify” option, an additional field requiring the roles within the organization to notify will populate.
9. Enter the number of days a case can be active in the identified phase in the “**Days for the Case Expiration and Notification**” field. Cases will remain active for the number of days based on the value entered here.
10. Add a “**Title of Notification to Recipients**” and a “**Message to Recipients**.”
 - a. To create a reminder prior to the expiration notification, check the box to “Create a reminder notification before a case expires.”
11. Select **Save and Add**.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1-3



National Background Investigation Services

Parent Org
Parent Org>Test Org 2021>Sub Test Org 2021

1 2 3

Configuration Menu

Assignment Rules

Assignment Rules

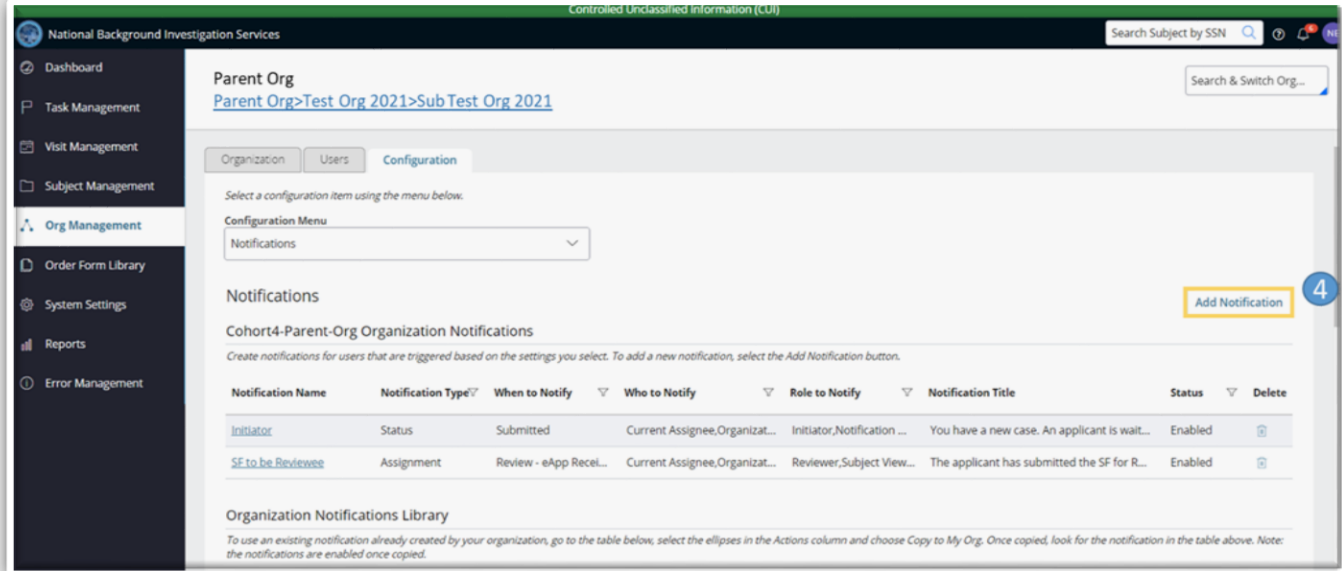
Notifications

Assignment Rules

Create new assignment and manage existing assignment rules. To add a new assignment rule, select the Actions button. To manage an existing assignment rule, go to the table below, select the ellipses in the Actions column and choose the applicable action.

Task Priority	Task Name	Task Description	Actions
1	Initiate Form	Initiate SF for applicant.	
5	Review Form	Review SF back from Subject.	
30	Authorize	Authorize funds for B.	

Step 4



National Background Investigation Services

Parent Org
Parent Org>Test Org 2021>Sub Test Org 2021

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu

Notifications

4

Add Notification

Cohort4-Parent-Org Organization Notifications

Create notifications for users that are triggered based on the settings you select. To add a new notification, select the Add Notification button.

Notification Name	Notification Type	When to Notify	Who to Notify	Role to Notify	Notification Title	Status	Delete
Initiator	Status	Submitted	Current Assignee,Organizat...	Initiator,Notification ...	You have a new case. An applicant is wait...	Enabled	
SF to be Reviewed	Assignment	Review - eApp Recei...	Current Assignee,Organizat...	Reviewer,Subject View...	The applicant has submitted the SF for R...	Enabled	

Organization Notifications Library

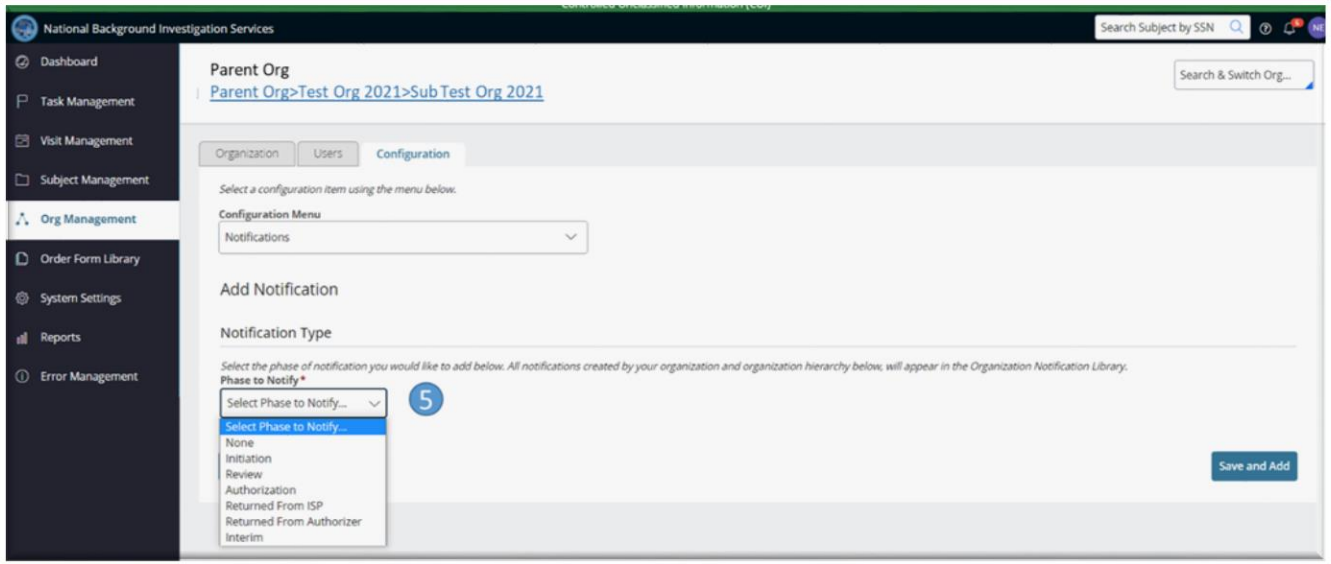
To use an existing notification already created by your organization, go to the table below, select the ellipses in the Actions column and choose Copy to My Org. Once copied, look for the notification in the table above. Note: the notifications are enabled once copied.



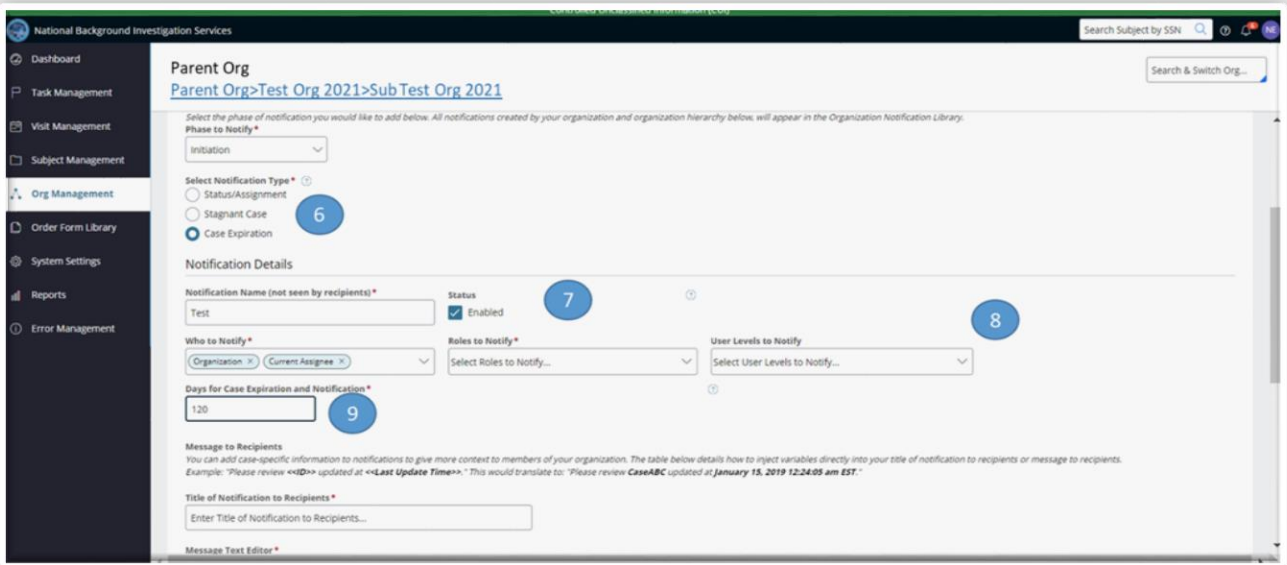
DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Step 5



Steps 6-9

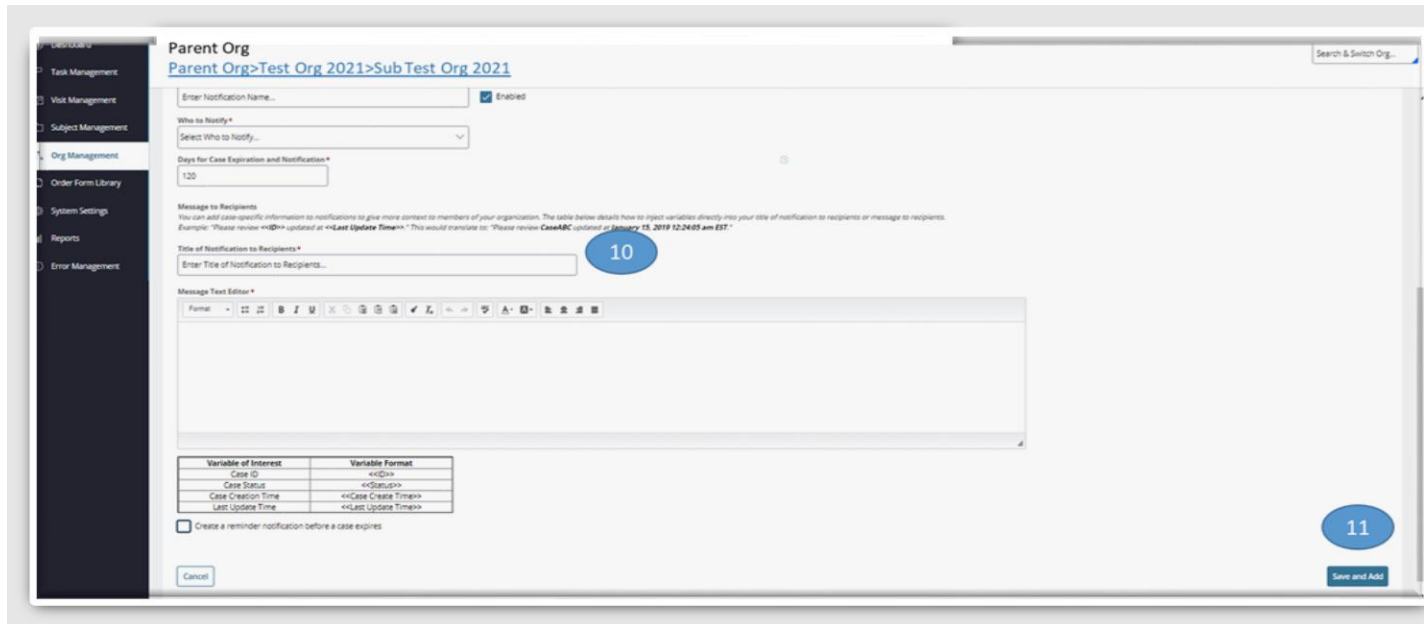




DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 10-11



Parent Org

Parent Org > Test Org 2021 > Sub Test Org 2021

Enter Notification Name... ☒ Enabled

Who to Notify*

Select Who to Notify...

Days for Case Expiration and Notification*

120

Message to Recipients

You can add case-specific information to notifications to give more context to members of your organization. The table below details how to input variables directly into your title of notification to recipients or message to recipients.
Example: "Please review <<ID>> updated at <<Last Update Time>>". This would translate to: "Please review CaseABC updated at January 15, 2019 12:24:05 am EST".

Title of Notification to Recipients*

Enter Title of Notification to Recipients...

10

Message Text Editor*

Format

Variable of Interest	Variable Format
Case ID	<<ID>>
Case Status	<<Status>>
Case Creation Time	<<Case Create Time>>
Last Update Time	<<Last Update Time>>

☐ Create a reminder notification before a case expires

Cancel

11

Save and Add



HOW TO ADD ORGANIZATION MOVE/MIGRATION NOTIFICATIONS

Purpose and Overview: Organization Move/Migration Notifications are utilized to alert users when a team or an organization is moved internally or externally. A notification will be sent as an alert to users when a team or an organization. For External Organization Migrations, notifications will automatically be sent out to affected organizations, the Organization Manager of the losing organization (parent of migration organization) and users in the migrating and gaining organizations.

Below outlines the 10-step process to add a Move/Migration Notification:

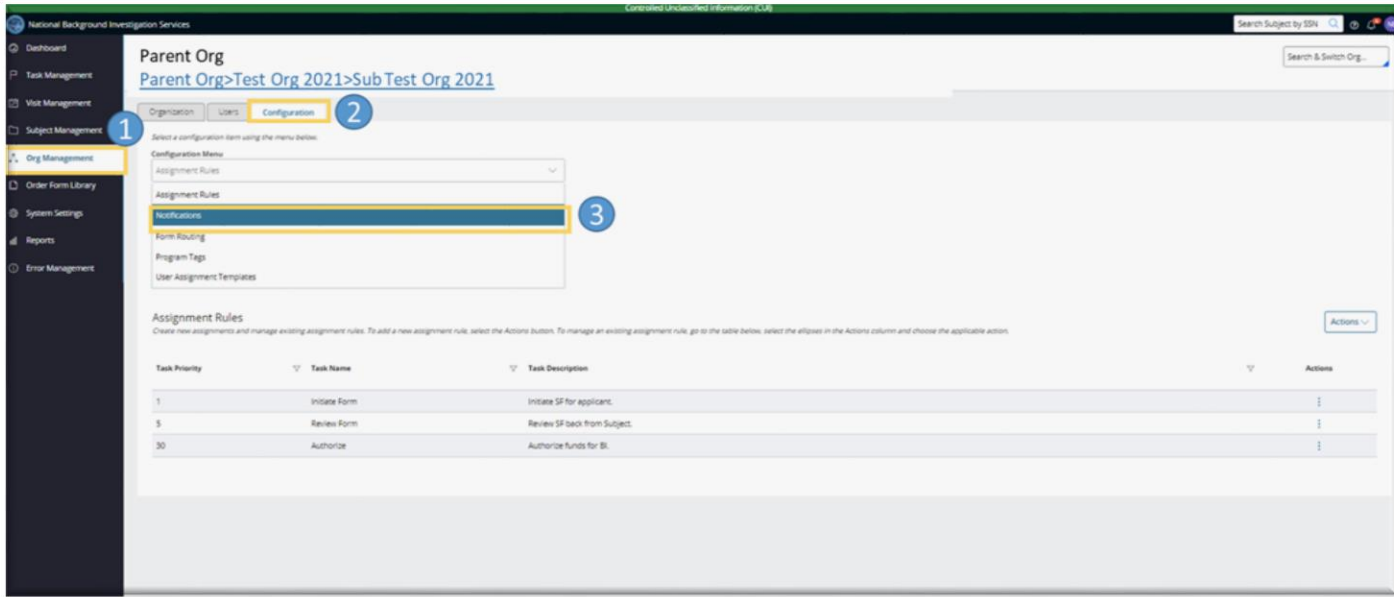
1. From login, select **Org Management**.
2. Switch to the designated org (if needed) then select the **Configuration** tab.
3. From the Configuration Menu, select **Notifications**.
4. To create a new notification, click the **Add Notification** button on the far-right side of the screen.
5. Select “None” for **Phase to Notify**.
6. Select **Organization Move** as the notification type and enter the Notification Name.
 - a. Make sure Enabled is checked for the Status, if unchecked, the notification will not be sent.
 - b. Choose either “A Team is Moved,” or “An Organization is Moved” from the “When to Notify” drop-down menu.
 - c. If “A Team is Moved” is selected for the When to Notify field, then select either (1) Team or (2) Organization from the “Who to Notify” drop-down menu.
 - d. If “An Organization is Moved” is selected from the When to Notify field, then Organization will automatically be selected under “Who to Notify.”
7. Select an option for **Who to Notify**. The “Roles to Notify” drop-down menu will populate. Select specific roles within the organization to be notified or every role within the organization to be notified.
8. Add “**Title of Notification to Recipients**” and include a message in the Message Text Editor. Users may use the text in the variable table to format the message
9. Add a “**Message to Recipients**.” This will allow case-specific information for notifications in order to provide more details to the members of a user’s organization.
10. Select **Save and Add**.



DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

JOB AID

Steps 1-3



National Background Investigation Services

Controlled Unclassified Information (CUI)

Search Subject by SSN

Search & Switch Org...

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu

Assignment Rules

Assignment Rules

Notifications

Form Routing

Program Tags

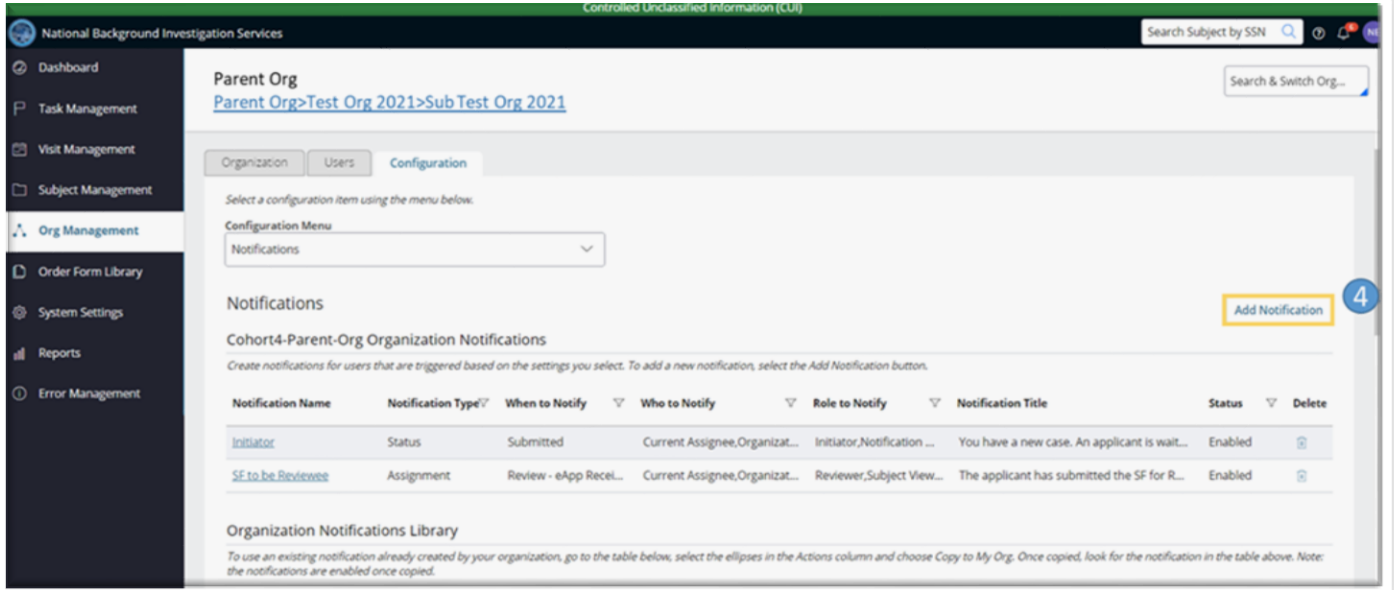
User Assignment Templates

Assignment Rules

Create new assignments and manage existing assignment rules. To add a new assignment rule, select the Actions button. To manage an existing assignment rule, go to the table below, select the ellipses in the Actions column and choose the applicable action.

Task Priority	Task Name	Task Description	Actions
1	Initiate Form	Initiate SF for applicant.	
5	Review Form	Review SF back from Subject.	
30	Authorize	Authorize funds for BI.	

Step 4



National Background Investigation Services

Controlled Unclassified Information (CUI)

Search Subject by SSN

Search & Switch Org...

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Organization Users Configuration

Select a configuration item using the menu below.

Configuration Menu

Notifications

Notifications

Cohort4-Parent-Org Organization Notifications

Create notifications for users that are triggered based on the settings you select. To add a new notification, select the Add Notification button.

Notification Name	Notification Type	When to Notify	Who to Notify	Role to Notify	Notification Title	Status	Delete
Initiator	Status	Submitted	Current Assignee, Organizat...	Initiator, Notification ...	You have a new case. An applicant is wait...	Enabled	
SF to be Reviewed	Assignment	Review - eApp Recei...	Current Assignee, Organizat...	Reviewer, Subject View...	The applicant has submitted the SF for R...	Enabled	

Organization Notifications Library

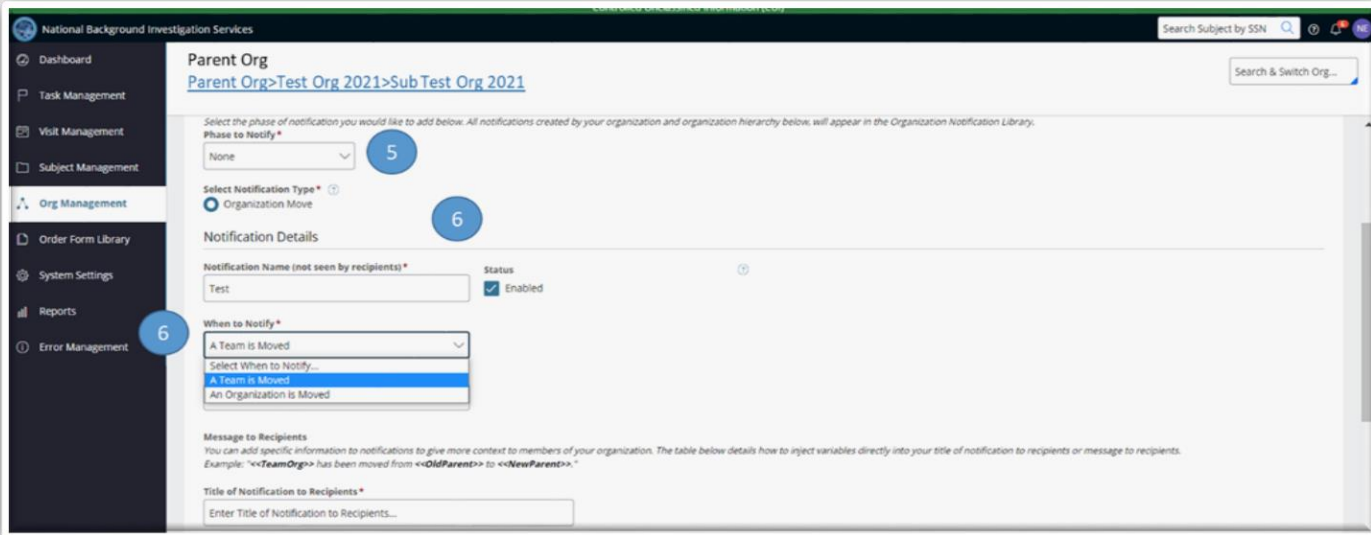
To use an existing notification already created by your organization, go to the table below, select the ellipses in the Actions column and choose Copy to My Org. Once copied, look for the notification in the table above. Note: the notifications are enabled once copied.



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Steps 5-6



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Select the phase of notification you would like to add below. All notifications created by your organization and organization hierarchy below, will appear in the Organization Notification Library.

Phase to Notify *

None

Select Notification Type *

Organization Move

Notification Details

Notification Name (not seen by recipients) *

Test

Status

Enabled

When to Notify *

A Team is Moved

Select When to Notify...

A Team is Moved

An Organization is Moved

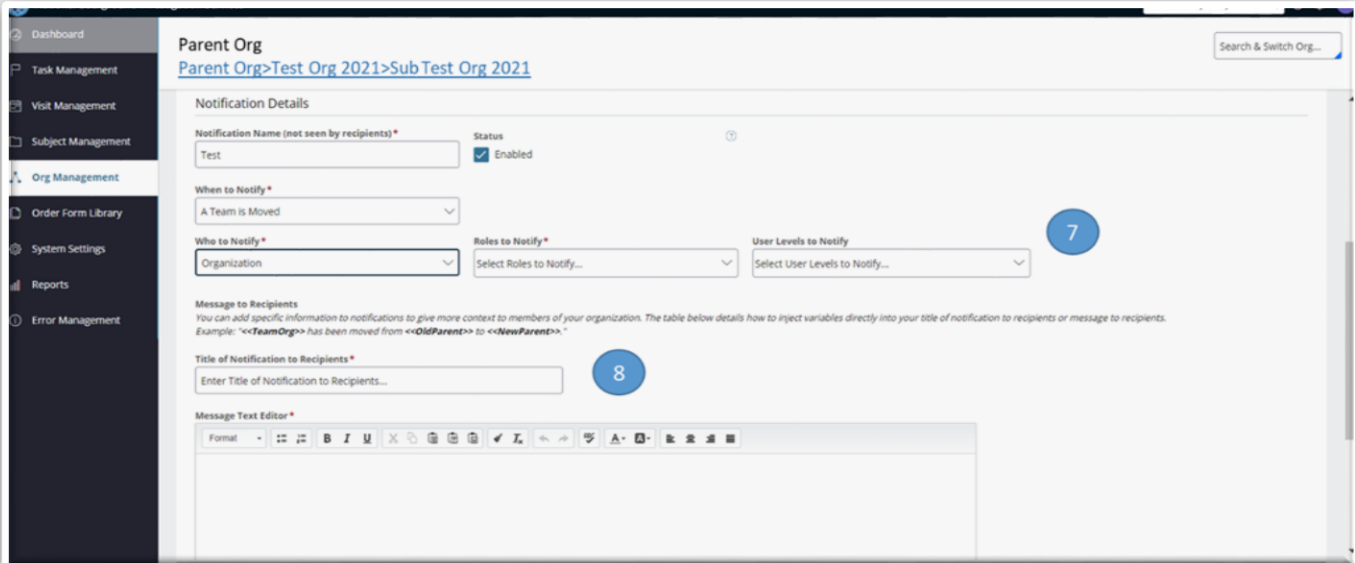
Message to Recipients

You can add specific information to notifications to give more context to members of your organization. The table below details how to inject variables directly into your title of notification to recipients or message to recipients.
Example: "<<TeamOrg>> has been moved from <<OldParent>> to <<NewParent>>."

Title of Notification to Recipients *

Enter Title of Notification to Recipients...

Steps 7-8



National Background Investigation Services

Search Subject by SSN

Search & Switch Org...

Parent Org
[Parent Org>Test Org 2021>Sub Test Org 2021](#)

Notification Details

Notification Name (not seen by recipients) *

Test

Status

Enabled

When to Notify *

A Team is Moved

Who to Notify *

Organization

Roles to Notify *

Select Roles to Notify...

User Levels to Notify

Select User Levels to Notify...

Message to Recipients

You can add specific information to notifications to give more context to members of your organization. The table below details how to inject variables directly into your title of notification to recipients or message to recipients.
Example: "<<TeamOrg>> has been moved from <<OldParent>> to <<NewParent>>."

Title of Notification to Recipients *

Enter Title of Notification to Recipients...

Message Text Editor *

Format

B I U X

Message Text Editor



Steps 9-10

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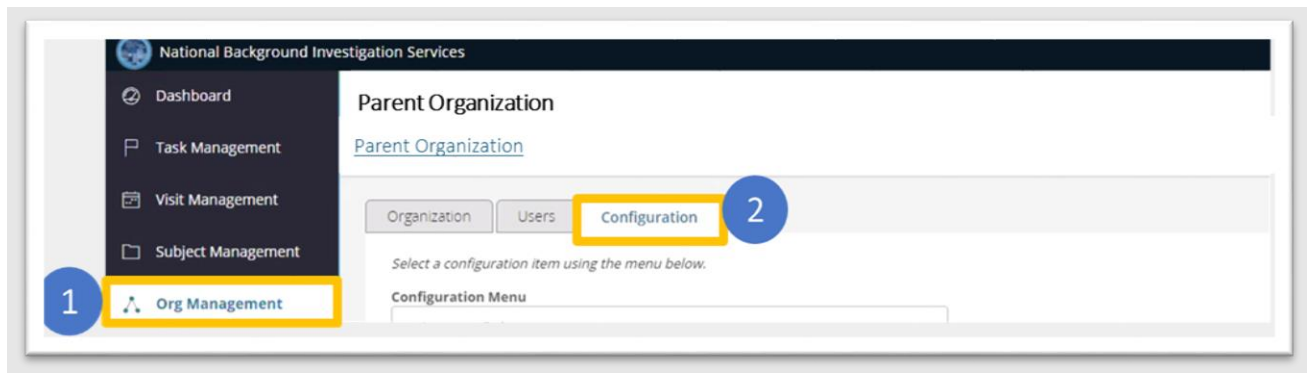
HOW TO EDIT NOTIFICATIONS

Purpose and Overview: The details of a notification can be edited as needed.

Below outlines the 7-step process for editing Notifications:

1. From initial log in, select **Org Management** from the Navigation Menu on the left.
2. Navigate to your organization (if needed) then select the **Configuration** tab.
3. From the Configuration Menu, select **Notifications**.
4. After selecting Notifications from the drop-down, users will now be able to see the full list of existing notifications for the organization that they are logged into.
5. To view the details of a specific notification, search for and locate that notification using the **Notification Name** column and select the Notification Name to open the details of the selected notification.
6. From this screen, scroll down to bottom of the page and select the **Edit** button. Make necessary edits to any configurable fields.
7. Select **Save**.

Steps 1 -2

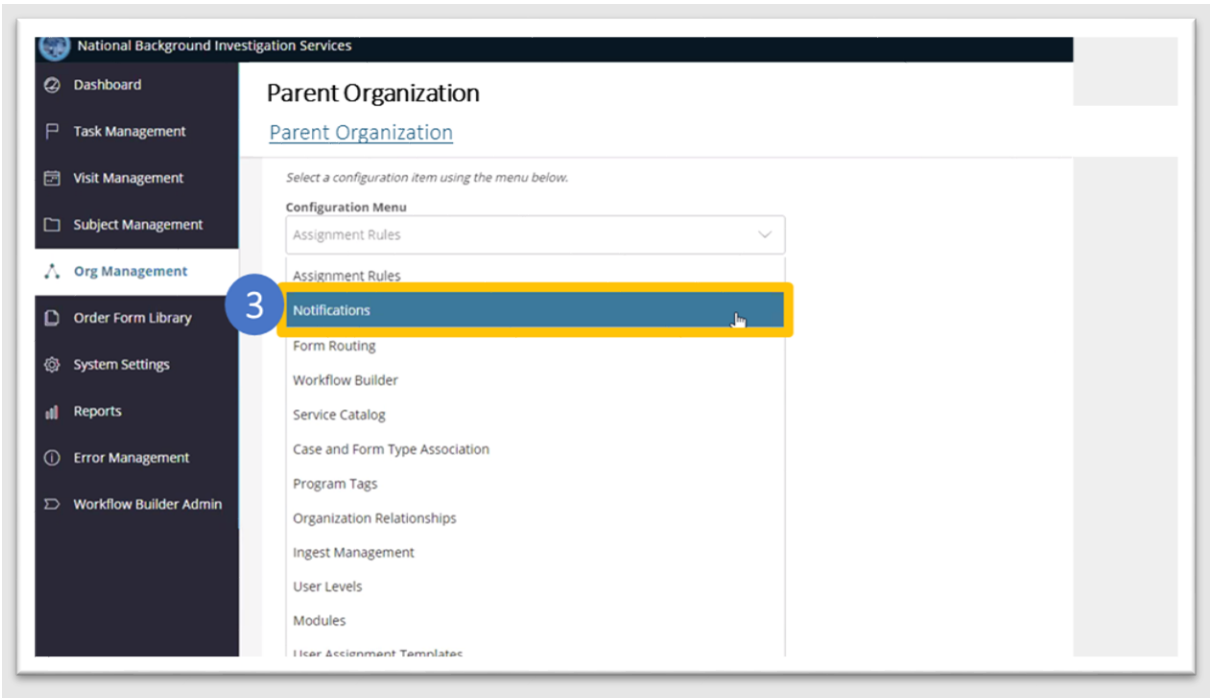




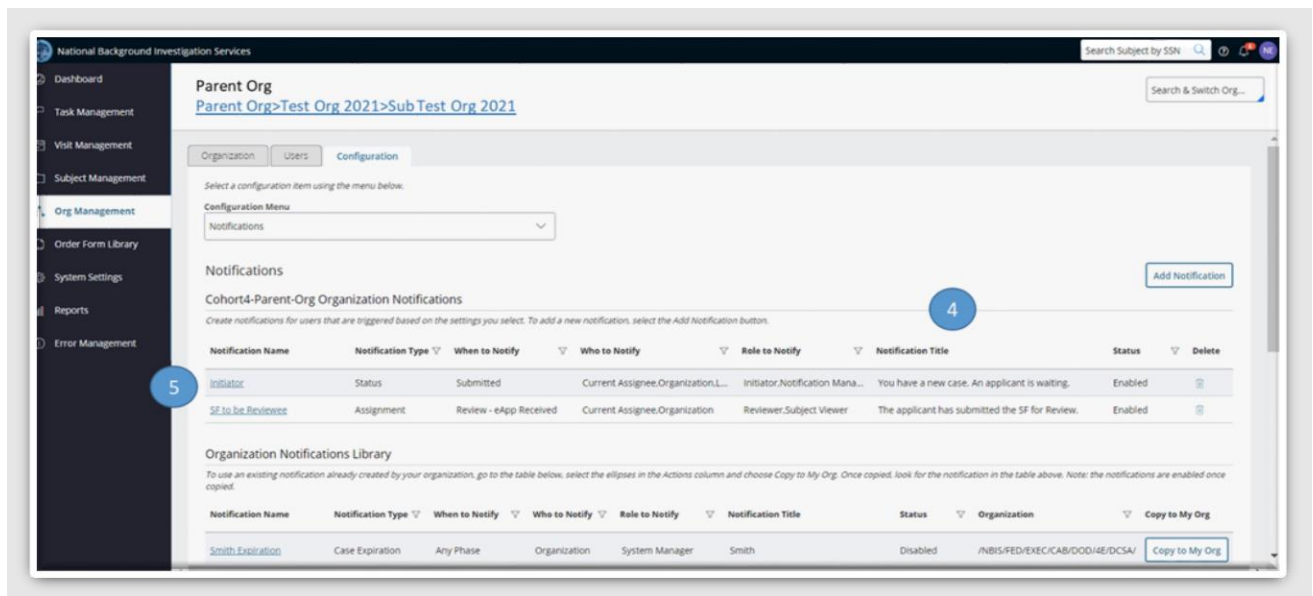
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Step 3



Steps 4 - 5





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Step 6

6

Step 7

7



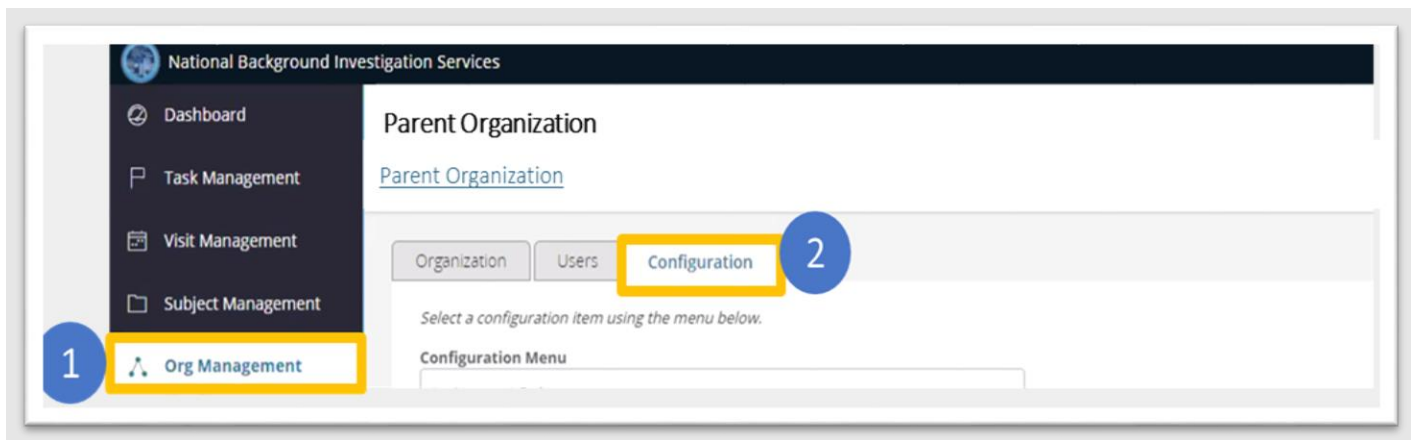
HOW TO DELETE NOTIFICATIONS

Purpose and Overview: Notifications can be deleted if no longer need by the org.

Below are the 4 steps for deleting Notifications:

1. From initial log in, select **Org Management**. from the Navigation Menu on the left.
2. Navigate to your organization (if needed) and then select the **Configuration** tab.
3. From the Configuration Menu, select **Notifications**.
4. Select the **trash can** icon in the Delete column to delete any existing notification.

Steps 1-2

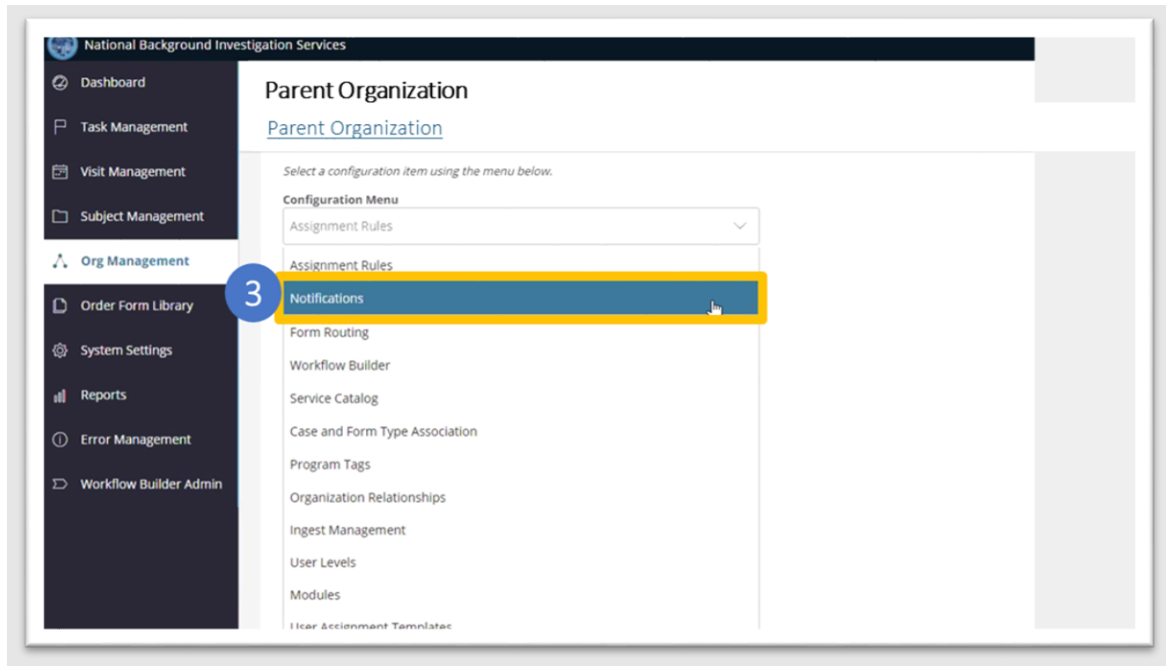




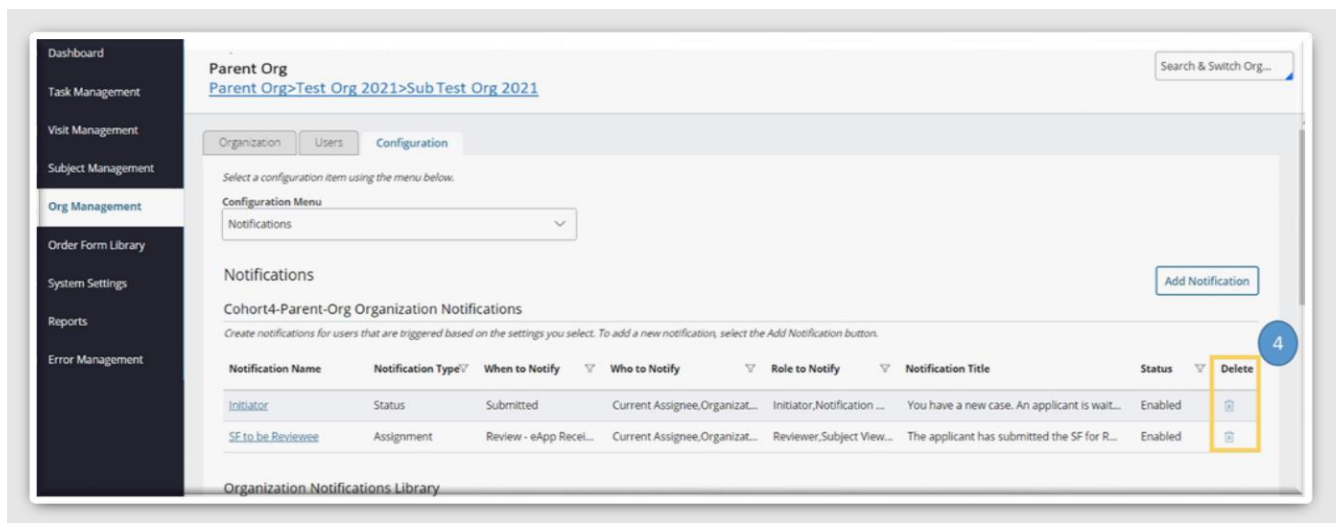
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Step 3



Step 4





ORDER FORM TEMPLATES

User Role Required: Order Form Template Manager. The Order Form Template Manager creates, updates, and manages order from templates for their organization.

Purpose and Overview: Order Form Templates streamline the review and authorization phases by filling in some or all of the order form information for the Position Details, Optional Coverage, and Financial Details. When the Order Form Template is selected and applied to a case, it populates information to ensure consistency and to prevent having to manually enter data for each case request.

Order Form Templates are an **optional** configuration. Orgs can manually enter Position Details, Optional Coverage, and Financial Details for each case instead of creating templates.

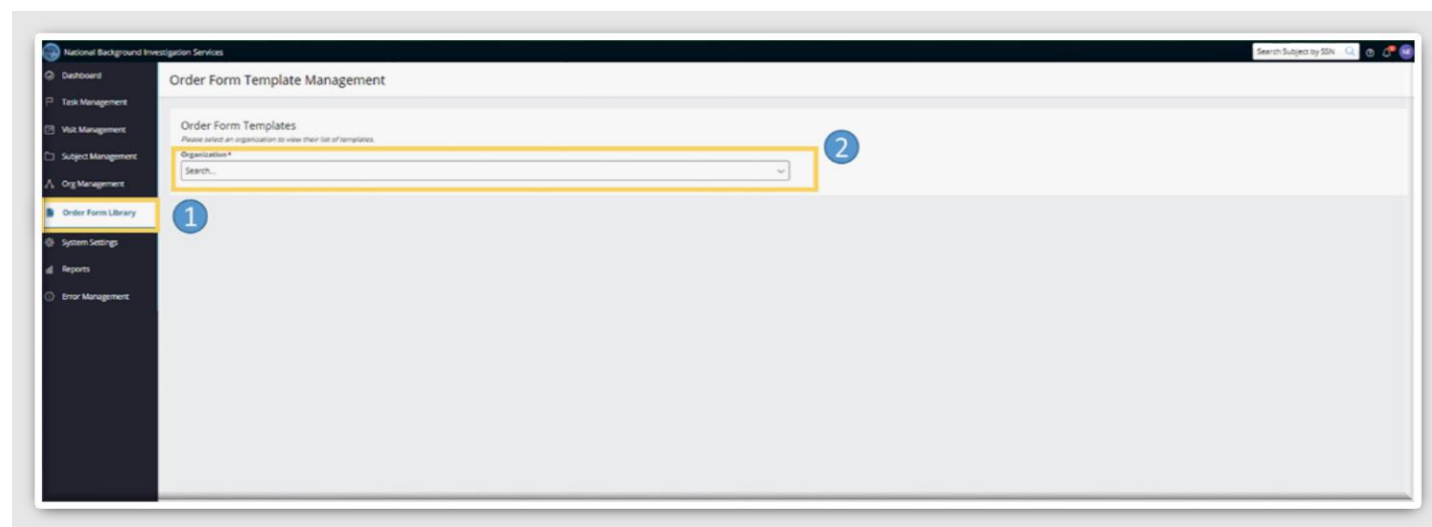
HOW TO VIEW ORDER FORM TEMPLATES

Purpose and Overview: Users with the Order Form Template Manager role can create new and manage existing Order Form Templates for an organization from the Order Form Library. All users can view Order Form Templates from the Order Form Library.

Below is the 3-step process to view an Order Form Template:

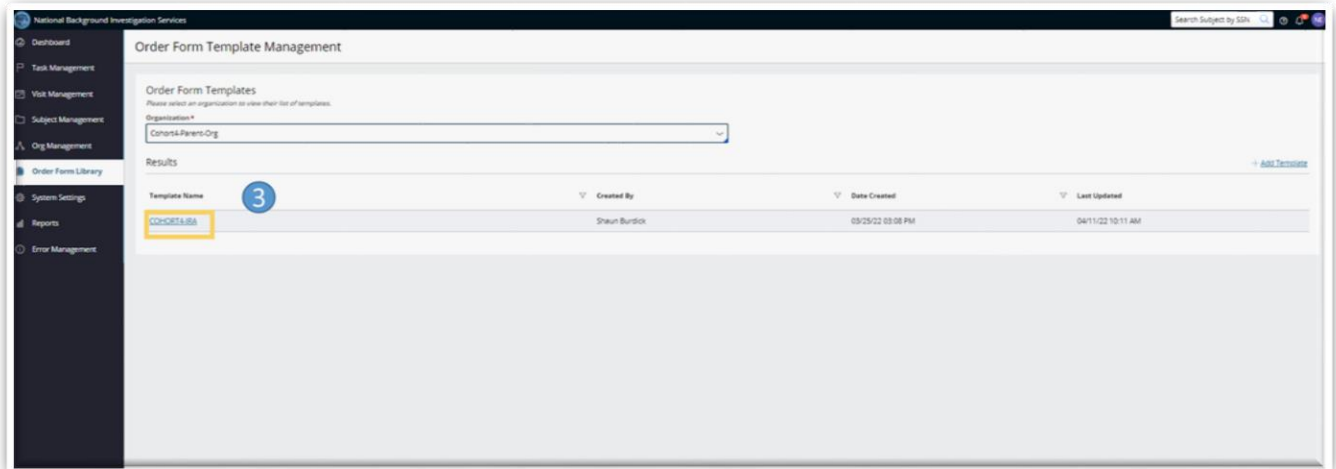
1. From initial log in, select **Order Form Library** from the navigation menu on the left.
2. **Select the Organization** from the drop-down menu. Alternatively, a user can type into the organization search box and a list of orgs will appear. Select the org name.
3. A list of Order Form Templates will populate in the Order Form Library results. Select the **Template Name hyperlink** to view a specific template.

Steps 1-2





Step 3



HOW TO CREATE ORDER FORM TEMPLATES

Purpose and Overview: Users with the Template Manager role can manage an organization's Order Form Templates from the Order Form Library. Order Form Templates can be created for each investigation type as needed.

Below is the 9-step process to add an Order Form Template:

1. From initial log in, select **Order Form Library** from the left navigation menu.
2. Select the **organization** from the drop-down menu. Alternatively, a user can type into the organization search box and a list of orgs will appear. Select the org name.
3. Select the **"Add Template"** hyperlink to create/add a new Order Form Template.
4. Enter the **Template Name**.
5. Select **"Only My Organization"** if you do not want the template automatically inherited and used by sub-organizations within your hierarchy.
6. If creating a linked or copied template, from the Select a **Base Template** drop-down menu choose from an existing parent org's base template, if available. Select either Link or Copy Template option to expedite the template creation process. If creating a Base Template, then leave this field blank.
 - a. Linking a template will copy all the base templates values, and these values will only be changed on the new template when changes are made to the respective fields on the base template.
 - b. Copying a template will copy all the base templates values onto the new template, and those same values can be changed directly from the new template, without affecting the original values on the base template.

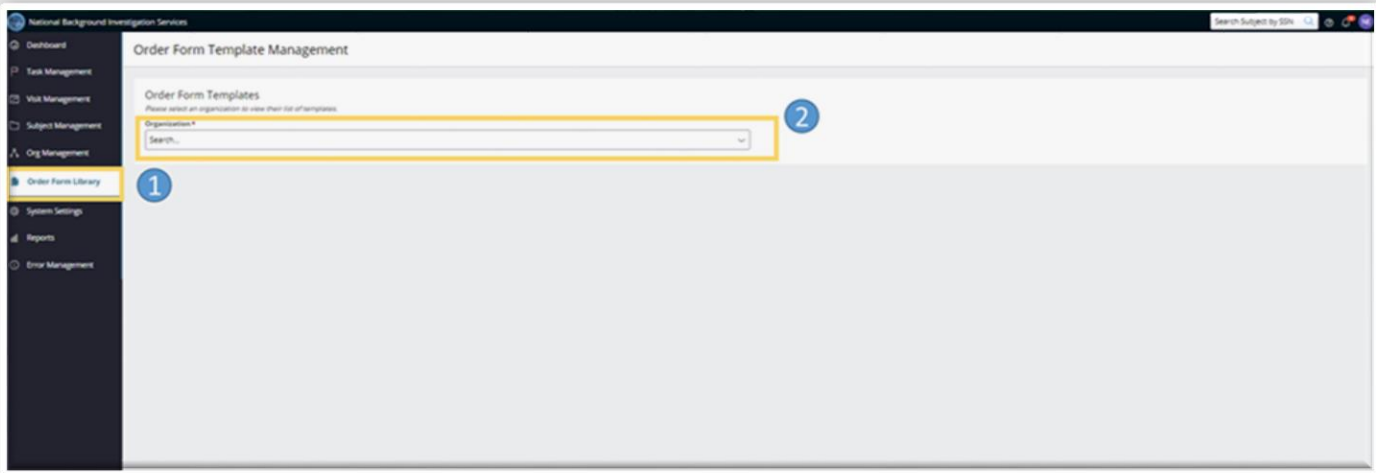


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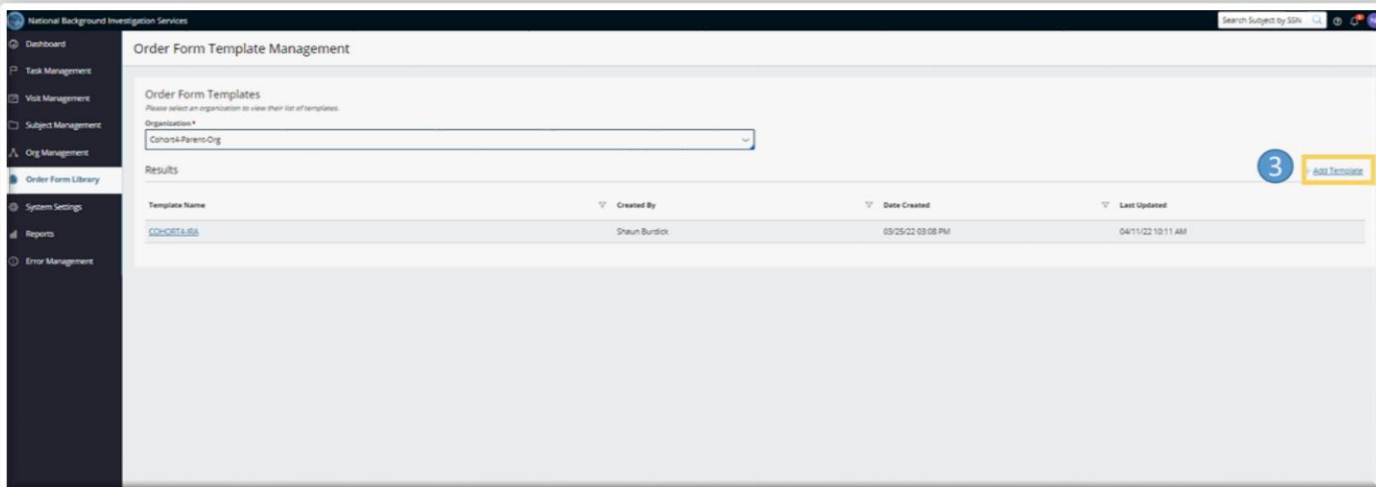
7. Manually enter the specific information to include in the template in each tab for the Position Details, Optional Coverage, and Financial Details. Although completing fields in these tabs are not mandatory when creating a template, this does not reflect what fields are required during Review & Authorization.
8. Select **Save**.
9. The template will appear under “**Results**” in the Order Form Template list within your organization.

Steps 1-2



The screenshot shows the 'Order Form Template Management' page. On the left is a navigation sidebar with the following items: Dashboard, Task Management, Visit Management, Subject Management, Org Management, Order Form Library (highlighted with a blue circle and the number 1), System Settings, Reports, and Error Management. The main content area is titled 'Order Form Templates' and includes a sub-header 'Please select an organization to view their list of templates.' Below this is a search bar labeled 'Organization*' with a dropdown arrow, highlighted with a yellow box and the number 2. The rest of the main area is currently empty.

Step 3



The screenshot shows the 'Order Form Template Management' page after selecting an organization. The 'Organization*' dropdown now displays 'Coherent Parents Org'. Below this, a 'Results' section contains a table with the following data:

Template Name	Created By	Date Created	Last Updated
COHERENT PARENTS	Shaun Burdick	03/25/22 03:08 PM	04/11/22 10:11 AM

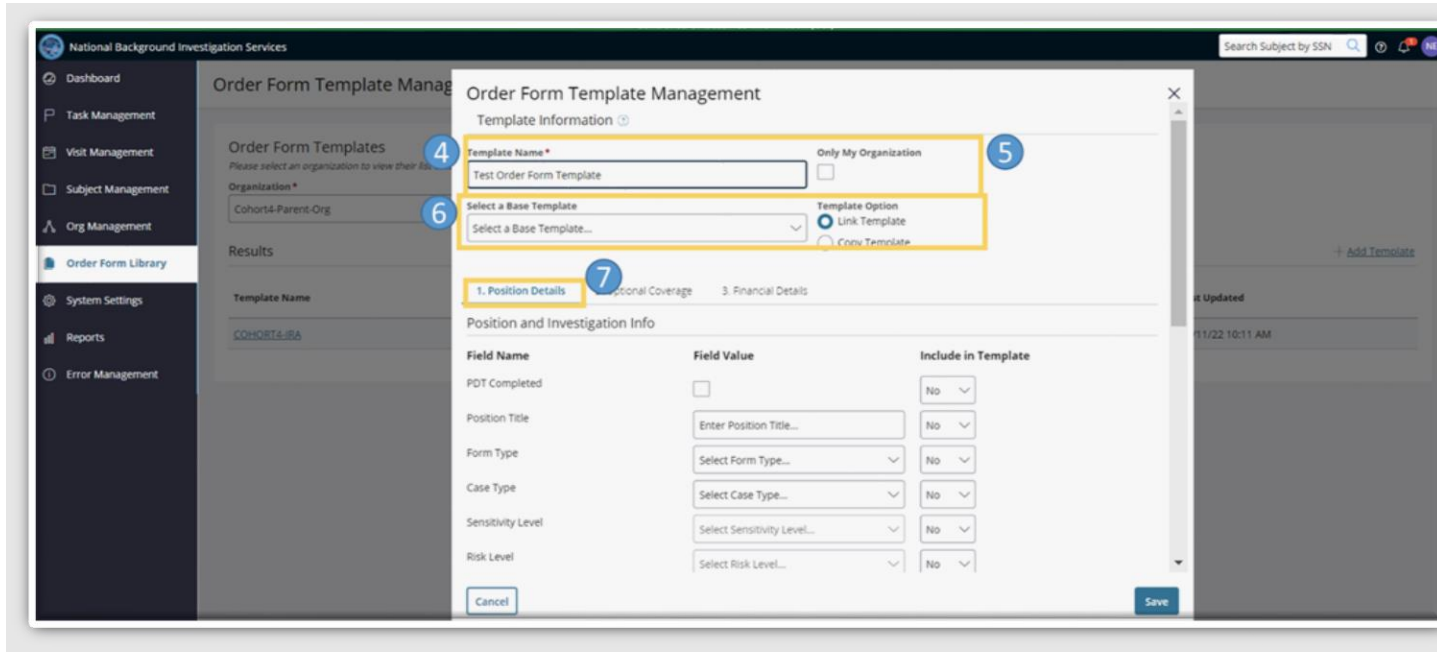
On the right side of the interface, there is a blue circle with the number 3 and a yellow button labeled 'Add Template'.



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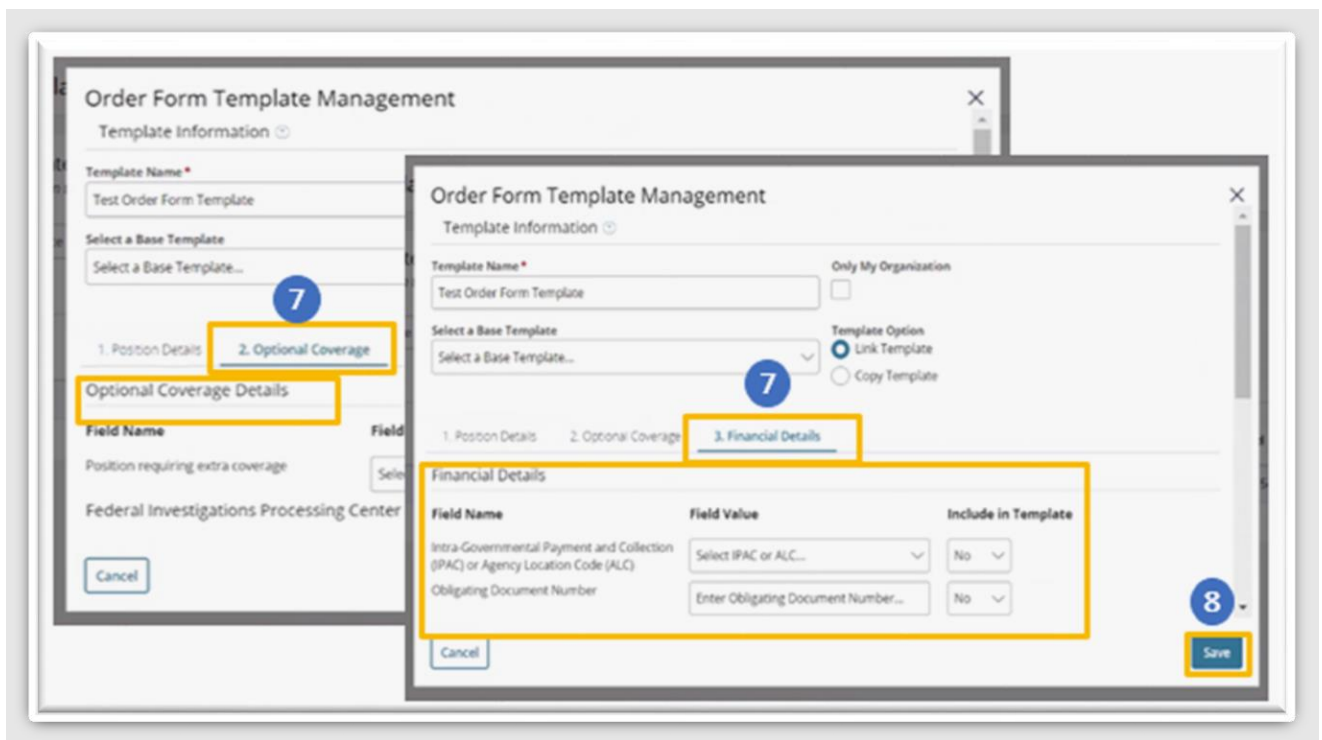
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Steps 4-7



The screenshot shows the 'Order Form Template Management' window. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Order Form Templates' and includes a search bar, a list of templates, and a 'Results' section. The 'Results' section shows a table with columns for 'Template Name' and 'COHORT4-ISA'. The 'Order Form Template Management' dialog box is open, showing the 'Template Information' tab. The dialog box has a 'Template Name' field (Step 4) and a 'Select a Base Template' dropdown (Step 6). The 'Template Option' section has radio buttons for 'Link Template' (selected) and 'Copy Template' (Step 5). The 'Position and Investigation Info' section has a 'Field Name' column and a 'Field Value' column. The 'Field Name' column lists: PDT Completed, Position Title, Form Type, Case Type, Sensitivity Level, and Risk Level. The 'Field Value' column lists: Enter Position Title..., Select Form Type..., Select Case Type..., Select Sensitivity Level..., and Select Risk Level... (Step 7). The 'Include in Template' column has a 'No' button for each field.

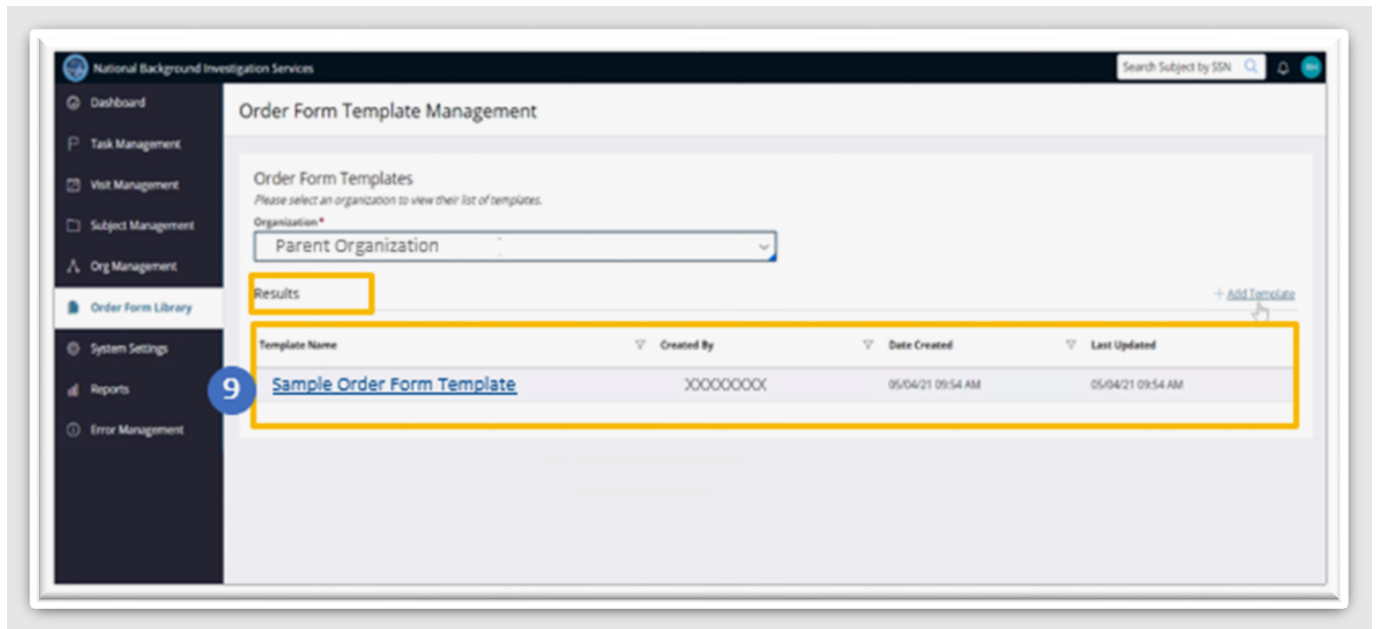
Steps 7-8



The screenshot shows the 'Order Form Template Management' window. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management, Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Order Form Templates' and includes a search bar, a list of templates, and a 'Results' section. The 'Results' section shows a table with columns for 'Template Name' and 'COHORT4-ISA'. The 'Order Form Template Management' dialog box is open, showing the 'Template Information' tab. The dialog box has a 'Template Name' field (Step 4) and a 'Select a Base Template' dropdown (Step 6). The 'Template Option' section has radio buttons for 'Link Template' (selected) and 'Copy Template' (Step 5). The 'Position and Investigation Info' section has a 'Field Name' column and a 'Field Value' column. The 'Field Name' column lists: PDT Completed, Position Title, Form Type, Case Type, Sensitivity Level, and Risk Level. The 'Field Value' column lists: Enter Position Title..., Select Form Type..., Select Case Type..., Select Sensitivity Level..., and Select Risk Level... (Step 7). The 'Include in Template' column has a 'No' button for each field. The 'Optional Coverage' section has a 'Field Name' column and a 'Field Value' column. The 'Field Name' column lists: Position requiring extra coverage and Federal Investigations Processing Center. The 'Field Value' column lists: Select... and Select... (Step 7). The 'Include in Template' column has a 'No' button for each field. The 'Financial Details' section has a 'Field Name' column and a 'Field Value' column. The 'Field Name' column lists: Intra-Governmental Payment and Collection (IPAC) or Agency Location Code (ALC) and Obligor Document Number. The 'Field Value' column lists: Select IPAC or ALC... and Enter Obligor Document Number... (Step 8). The 'Include in Template' column has a 'No' button for each field. The 'Save' button is highlighted (Step 8).



Step 9



HOW TO EDIT ORDER FORM TEMPLATES

Purpose and Overview: Users with the Order Form Template Manager role can manage an existing organization's Order Form Templates from the Order Form Library.

Below is the 4-step process to edit Order Form Templates:

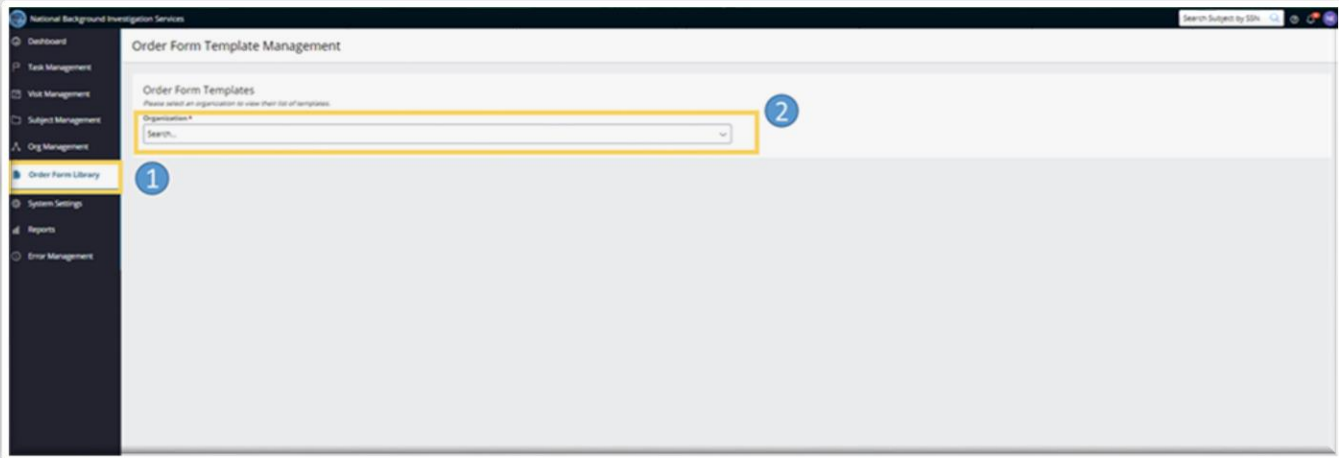
1. From initial log in, select **Order Form Library** from the navigation menu on the left.
2. Select the **organization** from the drop-down menu. Alternatively, a user can type into the organization search box and a list of orgs will appear. Select the org name.
3. A list of Order Form Templates will populate in the Order Form Library results. Select the **Template Name hyperlink** to view, edit or delete a specific template.
4. To update or edit select **Edit**, make any changes, and select **Save**.



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Steps 1 -2



National Background Investigation Services

Order Form Template Management

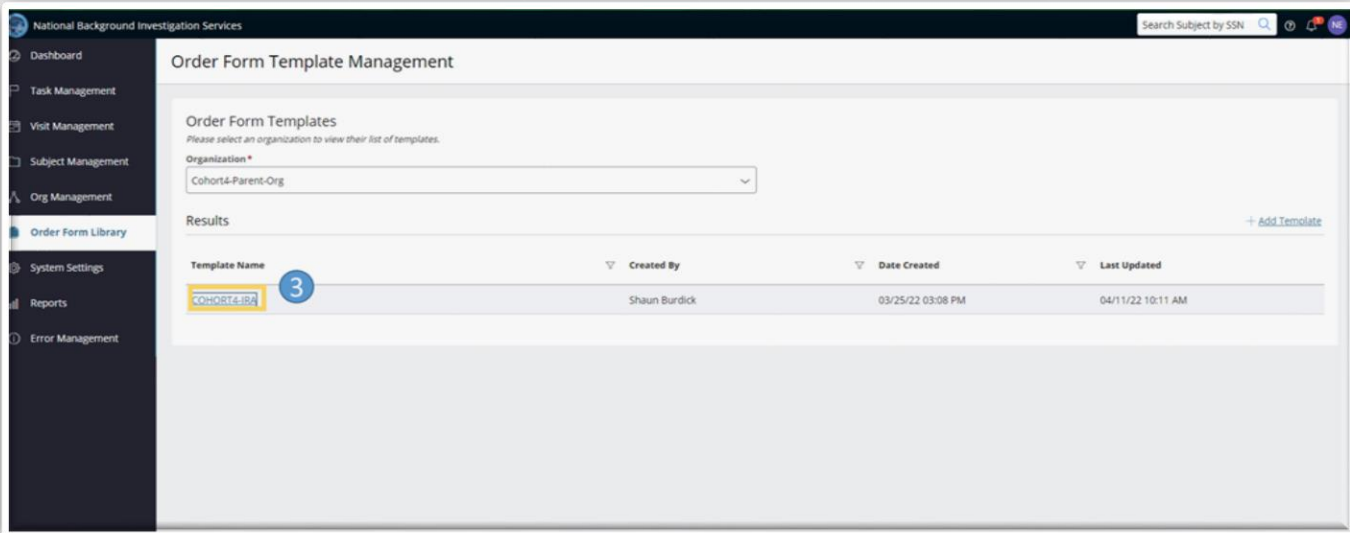
Order Form Templates

Please select an organization to view their list of templates.

Organization*

Search...

Step 3



National Background Investigation Services

Order Form Template Management

Order Form Templates

Please select an organization to view their list of templates.

Organization*

Cohort4-Parent-Org

Results

+ Add Template

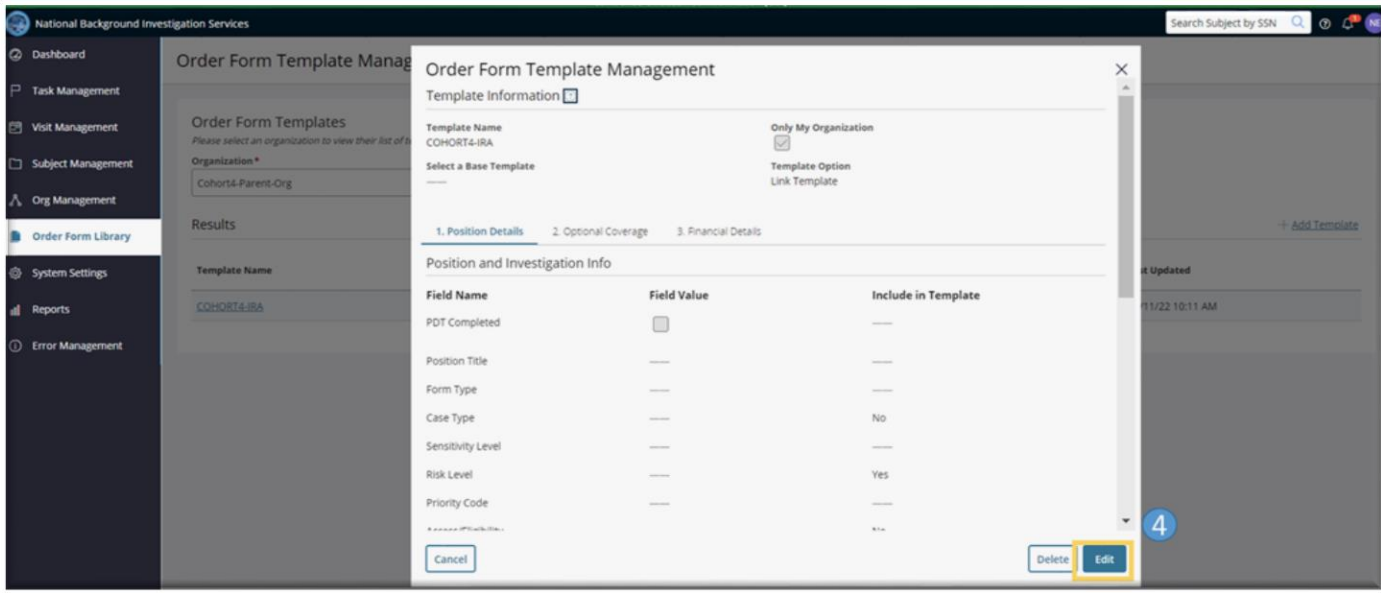
Template Name	Created By	Date Created	Last Updated
COHORT4-IDA	Shaun Burdick	03/25/22 03:08 PM	04/11/22 10:11 AM



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Step 4



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

Order Form Template Management

Order Form Templates

Please select an organization to view their list of s

Organization*

Cohort4-Parent-Org

Results

Template Name

COHORT4-IRA

Template Information

Template Name

COHORT4-IRA

Select a Base Template

Only My Organization

☒

Template Option

Link Template

1. Position Details

2. Optional Coverage

3. Financial Details

Position and Investigation Info

Field Name	Field Value	Include in Template
PDT Completed	<input type="checkbox"/>	---
Position Title	---	---
Form Type	---	---
Case Type	---	No
Sensitivity Level	---	---
Risk Level	---	Yes
Priority Code	---	---

Cancel

Delete

Edit

4



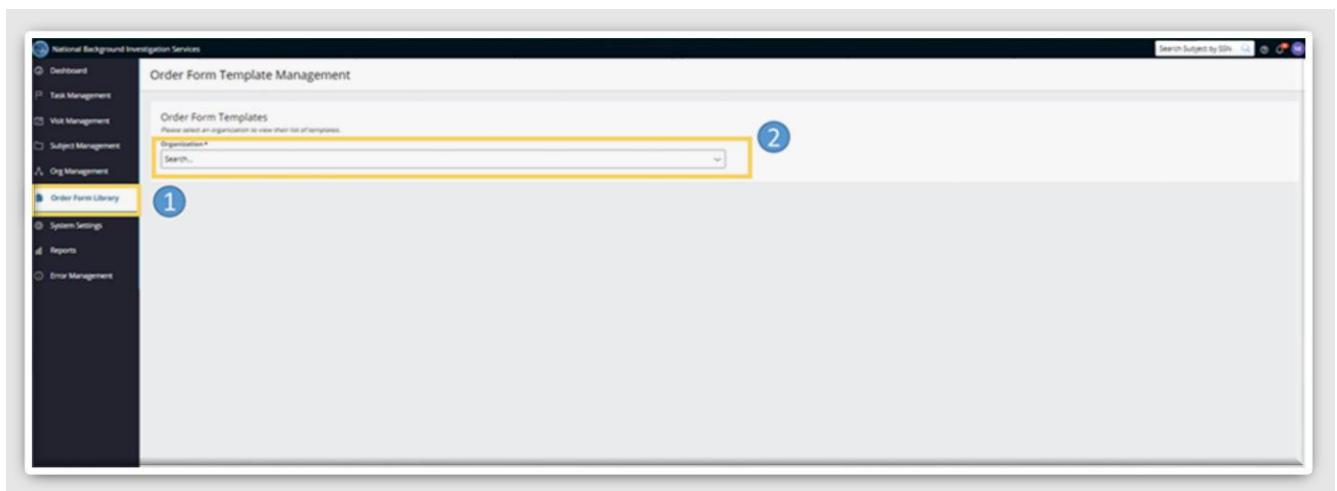
HOW TO DELETE ORDER FORM TEMPLATES

Purpose and Overview: Users with the Order Form Template Manager role can manage an existing organization's Order Form Templates from the Order Form Library.

Below is the 4-step process to delete an Order Form Template:

1. From initial log in, select **Order Form Library** from the navigation menu on the left.
2. Select the **organization** from the drop-down menu. Alternatively, a user can type into the organization search box and a list of orgs will appear. Select the org name.
3. A list of Order Form Templates will populate in the Order Form Library results. Select the **Template Name hyperlink** to delete a specific template.
4. To remove, select **Delete**, then **Confirm** to delete the template.

Steps 1 -2

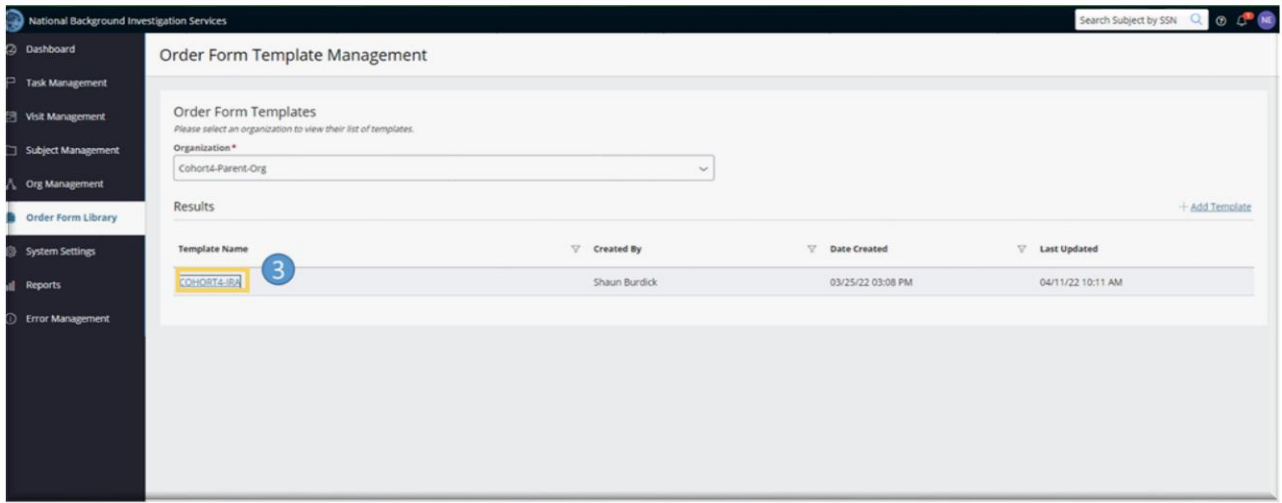




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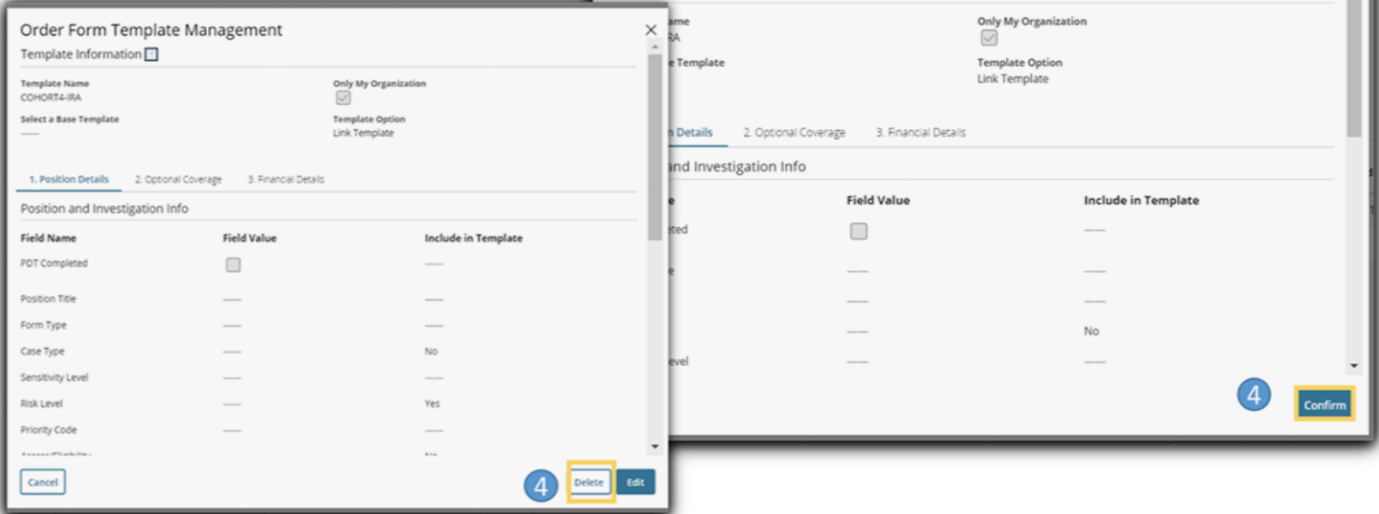
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Step 3



Template Name	Created By	Date Created	Last Updated
COHORT4-IRA	Shaun Burdick	03/25/22 03:08 PM	04/11/22 10:11 AM

Step 4



Field Name	Field Value	Include in Template
PDT Completed	<input type="checkbox"/>	---
Position Title	---	---
Form Type	---	---
Case Type	---	No
Sensitivity Level	---	---
Risk Level	---	Yes
Priority Code	---	---



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