

Checklist 08A

Performing Person Summary Screen Functions

Checklist 08A: In/Out Process Link

To in process a category into your PSM Net from the person summary screen follow the steps below:

- | Step | Activity |
|------|---|
| 1. | Log in as a JCAVS User for the SMO category you are in processing. |
| 2. | Click on Select Person (column on left). |
| 3. | Enter person's SSN or EDI PN . |
| 4. | Click the Display Person Summary radio button. |
| 5. | Click the gray Display button. |
| 6. | When the Person Summary screen appears, make sure the appropriate category is displayed on top. |
| 7. | Click the In/Out Process hyperlink located in the Person Category Information section to display the "View/Modify In/Out" screen. |
| 8. | Click on the gray Select SMO box to ensure the correct SMO is listed. |
| 9. | To select the SMO with which you have a parent relationship, enter today's date in the In Date box (Format: YYYY MM DD), or click the calendar and choose the date.

NOTE: Do not enter the out date in the out date text box. If you enter the out date in this section your relationship with this category will end on that date. |
| 10. | Next to Relationship , click the Owning or Servicing radio box. |
| 11. | Click the gray Save button. |
| 12. | Under the View/Modify Active Relationship(s) section, the newly established organization code should be listed under In Date . |

