

How to Create a Person Category in JPAS Webinar

January 24, 2013

Thank you for standing by and welcome to today's conference. At this time all participants are in a listen only mode. I would like to remind all parties today's call is being recorded. If you have any objections you may disconnect. I will now turn the call over to your host Mr. Andy Reyes. Sir you may begin.

Thank you. Hello and welcome to the first JPAS webinar offered by CDSE. Thank you for taking the time to join us today. My name is Andy Reyes—I am the course manager for the JPAS/JCAVS course, the virtual and instructor-led course; also a former adjudicator at the Army CCF and also a former Security Manager from Fort Buchanan, Puerto Rico. Before we get started I'm going to turn it over to my producer Steve Fowler, he's an instructional system designer here at CDSE and he'll go over some ground rules for today's webinar and some instructions on how to use the tools you will need to participate. Steve!

Thank you, Andy. Before we get started let's take a tour of our DCO meeting room. In the bottom left hand corner, you'll find a notes box. This has the call-in number and other announcements that we may post as necessary. These notes will remain on the screen throughout the webinar for your reference. If you view the presentation somewhat small you can use the full screen button up in the upper right hand corner, but when we have poll questions you need to click on it again to bring it down to normal size. Over to the right is the Q&A box for entering questions/feedback to the presenter. Since all participants' phones are muted, this is your only way to communicate with the presenter. Below the presentation you'll find a file share box—we have three references that we'd like you to download at the conclusion of this webinar. Included in the file share box is the JPAS checklist for creating categories and a short exercise you can use to do on your own with the CDSE's virtual JPAS as well as some additional information. During this webinar they'll be several poll questions that will be popping up on your screen, so select your answer and we'll provide feedback. And we're going to start with the first poll question and this is: What is your experience with JPAS? Go ahead and answer the question. Polls stay open for a couple seconds. I am now closing the poll. And it appears about 67 percent has more than a year experience using JPAS. I'll turn it back over to you, Andy.

Thank you Steve. I'm going to go ahead and share my screen here so you can see, because again, this is going to be a demonstration. Should pop up on your screen here shortly, there it is. So we'll get started. The screen that you're seeing on the window—that you're seeing on your screen right now—is the JPAS Privacy Act statement, there's also some do's and don'ts if you look up at the top there where it says all in red, I would read this when you have time, there's been a lot of changes to JPAS and you want to make sure you're in compliance with JPAS policy. Once you read all the information on the screen, you need to scroll down and you have to agree before you can enter JPAS. If you decide you want to disagree, obviously you're not going to get into JPAS. So I'll just click on agree, and it's going to bring me to the JPAS sign-in

screen. We had to make some modifications on the virtual system here, so that's why you see the extra "Select a Training User" down at the bottom of the screen. Once you get on the virtual you can see that there are several user levels; we made it easy for you. You can choose either one of these user levels and you can practice with the practical exercise down at the bottom of the screen that Stephen talked about earlier. We're going to stay as Studc1203; at no time when you're using a virtual do you enter your CAC card—you don't need your CAC card. This will automatically go ahead and log you in. So what we're going to do is go ahead and click on sign-in. Once we click on sign-in, or I click on sign-in, it brings you to the choose category level screen. You noticed that it stopped me here, if you have a user ID and only one user level, it's going to log you straight in, it's not going to stop you here. But because I have multiple person categories here, I have an industry and civilian category and I also have multiple user levels, user levels 2 through 6, and I also have account manager privileges. You do not need account manager privileges to create a category in JPAS. All you need is a level 2 through 6.

So with that, we're going to go to our second poll and it should be on your screen there and it says: Levels 2 through 6 can create person categories in JCAVS? A couple more seconds. I see a few of you changed your answer. Alright, we're going to close the poll. And a 100 percent here had true—and that is true. And like I said, I pretty much gave you the answer earlier. So, JPAS levels 2 through 6 can create a person category. So we're back on the screen here, and I'm going to click on okay, once I choose the level 4, that's the one I'm going to be operating. And I'm going to be operating as an industry person category—it really doesn't matter, the steps are the same as we go through the process.

So now we're on the welcome screen, I know since about 72 to 76 percent of you are experienced JPAS users, notice that this screen is pretty cleaned up because there's a lot of information on the screen—so pay attention to the screen as you go through as you're logging in because there's a lot of information on this page that the program manager at (DMDC) the Defense Manpower Data Center they place on there to keep you abreast of what's going on and on all the changes to JPAS. So I'm going to go to the left hand side here and on the purple side and I'm going to click on "Select Person." Once I click on "Select Person" it brings me to the "Select Person" screen, you notice also as I'm going through these screens, you know the top left hand corner there is a question mark. This question mark is a tutorial to this page only. If you need a larger tutorial, then you can click on the tutorial link on the left hand side there or on the purple side, and that will bring you the tutorial for the whole system. So on the "Select Person" screen here you can enter either the social security number or the individual's EDI number. That's been a recent change, they added the EDI number, the EDI number you can find on the individual's common access card. What does it stand for? It stands for Electronic Data Interchange Numbers Identifier. A whole mouthful, so, you can use either or, and you don't have to use dashes when you're entering the numbers. So here we're going to go ahead and we're going—or I'm going—to type in XYZAA0002, that's the social security number I'm going to use, we do not use live social security numbers, we do not use live PID data in our

virtual. So once I enter the social security number, again no dashes required, I come down to the third radio button and I click on “Display Maintain Person.” Once I click on “Display Maintain Person” you notice that a new box jumps out at you, the “Date of Birth” box. If the individual has a dual or duplicate social security number within the system, now you can filter by using all these boxes here: the last name, first name, middle if they have one in the system and the date of birth and that will help you get to the right person. So once I enter my social security number or EDI number and I click on the “Display Maintain Person” radio button, all I have to do is click on display. Now once I click on display, it’ll bring me to the “Maintain Person” screen, this screen right here gives you an opportunity now to validate that social security number. Once you click on “Save” at the bottom of the screen and you enter the wrong social security number, that social security number becomes permanent in the system, so you have to be careful with the social, double check your work. You notice there are several boxes here that are blank, that’s because we’re creating a new person here or a new category. You notice that last name in some of these fields here to the left, there’s an asterisk—these are required fields. You must fill in these fields.

So we’ll go ahead and create an individual. You notice that middle name is not required, but if you have it you can put it in. “Cadence” is Junior, Senior, the Third, the Fourth, the Eighteenth, if you want to add it in there you can. “Date of Birth” is a required field, so you can use the calendar widget to enter the individual’s date of birth. Then you can move over to “Citizenship,” it is a required field, I’ll add U.S. citizen. Marital status is optional, so if you want to add that in you can, or leave it blank. And of course we’re not going to add the date of death because we’re creating this individual. You notice that there is no asterisk next to “Date of Birth,” it’s a good idea, best practice to go ahead and add it in, so I’ll just go ahead and pick Alabama. And then “Country of Birth”—there is an asterisk, so it is a required field, and United States of America is right, the first selection so just go ahead and select that. Now one of the other changes that they added in JPAS is “Foreign Relations.” They’re allowing now the security managers or FSOs if you know this information from a pre-screening document or SF 86 and you know the individual is married to a foreign national or any other family members are foreign nationals you can go ahead and add this in. If you feel comfortable doing it, I’ll show you the steps, if you don’t feel comfortable doing it, it’s optional, you can allow the adjudicative facility to do it for you. But before we do that we have to scroll down to the bottom of the page and save our work. Let’s click on “Save,” and you notice that I typed in the name in lowercase and when I clicked on “Save,” everything went to uppercase, that’s an indication that I did save my work. If you’re still not sure you can just go back down and click on “Save” again. So I’ll move over to the right hand side here where it says “Modify Relationship”—if I would’ve tried to click on this button before I saved my work, it would’ve gave me a dialogue box saying that “you must save your work before you can modify relations.” So I’ll just click on “Modify Relations” button, you noticed that the screen refreshed and took me to the “Add, Modify, Remove Foreign Relations,” some of the PID information was brought on over from the previous screen. Move down to the next section when I identify sections, it’s everything in between these purple lines. So “Foreign

Relations”—when I drop that menu down, you notice there’s nothing in that box. That’ll come into play here shortly. I move down to the next section, “Foreign Relations Information” section, and you notice where it says “Relation,” there is an asterisk next to that word there, or next to that block, so when I drop that menu down you’ll see your selections there: brother, co-habitant, daughter, father, mother, sister, son, spouse, whatever’s appropriate—you go ahead and select it. I’m going to select mother.

The next box over is a required field that says “How Many,” I’m going to enter 1. And then the country is a required field again where they have that nationality from, just go ahead and select from the menu, I’m going to select Australian. Now as best practice—what I like doing, you notice that when I made that selection the box highlighted in blue. I like clicking somewhere in the white space to de-select that box cause if you have a scroll wheel and you mistakenly hit that scroll wheel you can change your choice there, and then it becomes a problem, you have to go back and edit it. Now if I wanted to add let’s say the father, is also from Australia, and I want to add the father, all I have to do is come to the right hand side here, click on “New Relations,” and I can just keep adding individuals to the list. But I’m just going to add the mother, you notice that it defaults to “Add” and all I have to do is click on “Save.” Once I click on “Save,” the screen refreshes and takes me back to the previous screen, and you notice now in the “Foreign Relations” box I have my choice there, mother from Australia. And of course if you added more individuals they’ll be a longer list here. Also there’s a button here, aka, (also known as) if there is no aka’s in here, and the individual does have one, they provided you that information, you can click on that link and go through the procedure of adding the aka in there. If the individual’s last name changes, or if there is a name change, the individual gets married, that will change automatically, that will populate automatically, you don’t have to do anything. But if you want to add it because you know it from a pre-screening or an SF 86, you can add it manually.

The next section down is the available category types—this is where we’re going to choose our category. I drop that menu down and you notice there’s various choices in here. Some of the changes in here that they added to: “Civilian Employee,” “Civilian Temporary Seasonal Co-op,” they made these changes cause now DoD can go in here and create temporary civilian employee categories. These categories are good for 120 days until the qualified action takes place. A qualified action being that the source database from your HR loads JPAS and that usually takes about 2 weeks, close JPAS, and then that becomes a permanent action. Or the adjudicative facility adds an investigation, maybe could be an old investigation or new investigation they added into the system and that becomes a permanent action. So now you don’t have to use the seasonal employee category for DoD, you can start using the civilian employee category.

But today we’re going to do industry and I’m going to click on industry. Again I’m going to click out on the white space, and I want you to pay attention to this area right here where it says “Person Category.” You notice that it’s defaulted to none. Now all I have to do is come to the right hand side here and where it says “Add Category,” I’m going to click on that button and the screen refreshes slightly—and you notice now in the person category, it added my industry

category in that box. To the right of that industry, the words industry, you notice it's not a zero but it actually is brackets. There's a bracket there. Now this individual had multiple categories, if you drop that menu you will see DoD or DoD civilian category in there. For industry—and industry only—you're required to put in a category classification and it tells you right there underneath the box required for industry category only. So you must enter a category classification cause later on when you want to separate this individual, it's going to give you a dialogue box saying "you must enter category classification" so you might as well go ahead and add it now. So you drop that menu down and you see your choices there, I'm going to go ahead and select "Contractor." Now if you know the individual's position, you could add it in here as optional, it's not required, but you can go ahead and add the individual's position in there. Now you notice to the right it says "Delete Category"—let's say you made a mistake and you saw this box up here where it says "Available Category Types" go blank, you didn't think it took, or it didn't take your selection, and you added another category, then at this point you just select the category, the additional category that you added—come to the right hand side, check that box where it says "Delete Category," and then just continue on. And then later on when you save your work you'll notice that that category will drop out.

Alright, so now we're going to associate this person category with a service agency. We must associate this industry category with a service agency. For industry you will always use "DoD contract company." So if I click on the menu, on the drop down menu, if I type E on my keyboard, and I count four up, it will bring me to "DoD contract company," four from the bottom. It will bring me to "DoD contract company." This will always be used for industry and industry only. If you're one of the components then you would use Army, Air Force or Navy. So once I make my selection here, I scroll slightly down the page, and you see where it says separation date, separation code, it doesn't come into play right now, but you'll see shortly towards the end of my presentation where it will come into play. Now I want to associate this category and this service agency with an organization. This is not your SMO code; this is your organization code. So now I'm going to click on modify organization, and it's going to bring me to the organization search page. Now you notice in the first section there it says "Select an organization" is highlighted in blue, there's nothing in that box but we're going to place something in here shortly.

If I go down to the next section, the "Search" section, you see where it says "Organization Service Agency." It defaults to Abraham Lincoln bicentennial commission. I want to drop that menu down and I want to search for "DoD contract company." Whatever you selected in the previous page, is what you're going to select here, so again I'm going to type E on my keyboard, I'm going to count four up, and I'm going to select "DoD contract company." Again I'm going to de-select so I don't make the mistake in selecting another choice. Again for industry, "DoD contract company." If I move on down, you notice where it says organization's name, organization location, and organization UIC rough code, pass code, cage code. You can only search by one of these fields—by one of these three fields. You can't search by using all of them

as a filtering device. You can only search by one of them. So what I'm going to do is I'm going to type in a cage code so I'm going to go CAG and I'm going to hold the shift key down, and use the number 8 key so I can get that asterisk, the asterisk is a wild card. So if I type in three characters—and I must have at least three characters and the asterisk it will give you a wild card. It will search the whole database for everything that has CAG in front of it. It will not search the characters in the middle, it will not search CAG at the end of the cage code, only the first three characters. Use the asterisk and then just click on search. When I click on search I get my results, my search results, and you notice I only have four because we can this information, but there will be multiple with CAG in the front of it. And since the Ravens are going to the Super Bowl, we're going to go ahead and select the third one down. Now you notice that my selections came up blue and underlined. Anything that's blue and underlined in JPAS is a hyperlink. So if I click on that third hyperlink, you notice it really didn't do anything great, but if I look up to the top of the page you notice that my selection now is on the top of the page. If you made a mistake, and you need to change a selection, you can just click on one of the other ones or the one that you meant to select. So now I'm going to go back to that third one down, I'm happy with my selection up on top, all my information is correct, I just go down to the bottom of the page and click on OK. Once I click on OK, the screen refreshes, it takes me back to the previous page, and you notice in the bottom left hand here my company, my location, and my status is listed in there on the page. So now all I have to do to save all my work, come down and click on the save button. Make sure you click on the save button because if you exit the screen without clicking the save button, you will not save all this pertinent information and you will have to come back and fill it in.

Now there are two ways you can go to the person summary screen. You can click the link, the hyperlink at the bottom of page person summary screen, or you can click on "Select Person," type in the social security number or EDI number and go in that way. I prefer going the easy way—clicking the "Person Summary" link.

So the next thing we're going to do and before we do that—we're going to conduct a poll, but we're going to talk about how to separate that category. But before that we're going to go to a poll. Poll should be on your screen and it says: "Industry categories should be separated once the individual is no longer affiliated with your organization? True or false?" I see that some of you are not sure. Okay, we're going to close the poll in about two seconds. Poll is closed. Alright, and the answer is true. If you created the category once the individual is no longer affiliated with your organization or your facility, then you should remove the category. And I'll show you how to do that right now. You should see my screen on there, on your screen now, so to separate a category again that's no longer affiliated you're going to do three things for industry: you're going to remove them from your PSM net, you're going to remove their access, and you're going to do this step right here, separate the category. To do that all you have to do is click on the calendar widget, use the current date, move on over to the separation code, drop that menu down, select the appropriate separation code—I'm going to use separation—then all you

have to do is come down to the bottom of the screen and click on save. Once you click on save the screen will refresh, you notice that my dates are still there, my separation code is still in there, but it really doesn't give you a good indication if you actually separated that category. So what you need to do is just go ahead and click on the link at the bottom of the screen where it says "Person Summary." It brings you to the person's summary screen. There's a dialogue box that's going to pop up and it's going to say the person category does not have an owning or servicing relationship, we know that because we didn't in-process this individual and that will be a future webinar. But to get rid of the dialogue box we'll go ahead and click on OK, and if you scroll down to the third section with the person category information section, you notice now there's a separation code, and if you look to the right just slightly there's a separation date. So 24 months and one day from that separation date this category will drop from the viewable portion of JPAS. Now this individual has a DoD category and that meaning an active duty category, reservist, National Guard or a DoD civilian category within JPAS and they have not been properly separated by the source database, then those other categories are going to remain in here. But if this was the only industry category and you put in the separation code and date, 24 months and a day two things are going to happen: this will disappear from the viewable portion of JPAS and this category will be archived. And then after 24 months to un-archive it, again that will be a future webinar.

For DoD you don't have to do anything, all DoD has to do is wait till the source database enters that separation code, and the separation date, the source database will take care of that, but you still have to remove the access and remove the individual from your personal security management network.

Okay so that concludes how to create a Person Category within JPAS. Again, whether you're in industry or civilian they're the same step, same procedures that you go through, except at the end when you, when the individual is leaving your organization you know the steps for separating are a little bit different. So you can visit, also you can visit our, if you're not sure about the user levels 2 through 6 you can visit our STEPP website, we'll pop up a link up here shortly and you can take our shorts to JPAS user level and also when you get the email also, again it will pop up on your screen, send us what you'd like to see, any future topics as far as JPAS is concerned.

Okay so we're going to conduct our last poll here. It should come up on your screen. It says "I know how to create a Person Category in JPAS." Okay we're going to close the poll here in about two seconds. Okay, well there are a few that still disagree with this statement, but I hope with the material that we provided you down at the bottom of the screen you'll feel confident to go in there, to go into JPAS and practice. Again don't practice on the live system, you can go to our STEPP website and do the virtual only and you can practice all day long. On your screen right now you should see the link and you should also see a JPAS email address: jpas.training@dss.mil and feel free to send us any questions or concerns that you may have. And again, please send us some future JPAS topics if you want, what you would like to see. Again, thank you for participating.