

Checklist 06B

Set/Maintain a Personnel Security Management Network

Checklist 06B: In-Processing Categories from the Person Summary screen

To add person categories from the Person Summary screen to your PSM Net follow the step below:

- | Step | Activity |
|------|--|
| 1. | Click on Select Person (column on left). Enter person's SSN or EDI PN. Select the Display Person Summary radio button. |
| 2. | Click the gray Display button. When the Person Summary screen appears, make sure the appropriate category is displayed. |
| 3. | Click the In/Out Process hyperlink located in the Person Category Information section to display the "View/Modify In/Out" screen, ensure the correct SMO is listed. If not select the correct SMO. To select the correct SMO, click on the grey Select SMO button. |
| 4. | Enter today's date in the In Date box (Format: YYYY MM DD), or click the calendar and choose the date. Next to Relationship, click the Owning or Servicing radio box. |
| 5. | Click the gray Save button. Under the View/Modify Active Relationship(s) section, the newly established SMO code should be listed under In Date. |

Note: Do not enter the Out date when adding a category to your PSM Net. If you do your relationship with that category will end on that date.

