

## 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 <b>JCAVS User</b> for the SMO category you are in processing.   |
| 2.   | Click on <b>Select Person</b> (column on left).   |
| 3.   | Enter person's <b>SSN or EDI PN</b> .   |
| 4.   | Click the <b>Display Person Summary</b> radio button.   |
| 5.   | Click the gray <b>Display</b> button.   |
| 6.   | When the Person Summary screen appears, make sure the appropriate category is displayed on top.   |
| 7.   | Click the <b>In/Out Process</b> hyperlink located in the <b>Person Category Information</b> section to display the "View/Modify In/Out" screen.   |
| 8.   | Click on the gray <b>Select SMO</b> 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 <b>In Date</b> box (Format: YYYY MM DD), or click the calendar and choose the date.<br><br>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 <b>Relationship</b> , click the <b>Owning</b> or <b>Servicing</b> radio box.  |
| 11.  | Click the gray <b>Save</b> button.  |
| 12.  | Under the <b>View/Modify Active Relationship(s)</b> section, the newly established organization code should be listed under <b>In Date</b> .  |

