

# Set/Maintain a Personnel Security Management Network

## Checklist 06: Adding Person categories by Organization

To add person categories by organization to your PSM Net follow the step below:

| Step | Activity   |
|------|--|
| 1.   | Log in as a JCAVS User for the SMOs PSM Net you want to add categories to.   |
| 2.   | Click on PSM Net (column on left) to display JCAVS Maintain PSM Net screen. Before you begin, check to make sure that the correct SMO and level are indicated in the top left corner under JCAVS Maintain PSM Net.<br>a. If not, click on the gray Select SMO button.<br>b. Under the SMO Code column, click on the correct SMO from the list provided.<br>NOTE: The SMO will be blue if it has not been clicked during this session or it will be maroon if it has been clicked earlier during this session.<br>c. Once you click on the correct SMO, it should take you back to the JCAVS Maintain PSM Net screen.<br>NOTE: It is vital that you have the correct SMO/Level listed before you proceed! |
| 3.   | Now to search the JPAS database, click on the Person Categories by Organization radio button.  |
| 4.   | Click the gray Add button. You should now be on the PSM Net Add Organization Person Categories screen. Determine Relationship - owning or servicing and select the radio button.   |
| 5.   | Click on the gray Select Organization button. You should now be on the Organization Search screen. Within the Search section, there is a drop down menu right next to Organization's Service/Agency.   |
| 6.   | Click on the drop down menu and scroll down until you see your appropriate Service/Agency. In the Organization UIC/RUC/PASCODE/CAGE box, type in the Code (All Industry Cage codes will be followed by "-I") for which you are establishing the PSM Net. An asterisk (*) can be used for wild card searches when using 3 or more characters.   |
| 7.   | Click the gray Search button. Under the Select Organization Search Results section, you should see the organization code for which you are establishing the PSM Net. From the Select Organization Search Results on the organization search screen, click on your organization code. The organization code will populate in the Selected Organization field.   |
| 8.   | Click on the gray OK button. This will take you back to the PSM Net Add Organization Person Categories screen. The organization code which you selected should now be listed after Organization.   |



### Checklist 06: Adding Person categories by Organization

To add person categories by organization to your PSM Net follow the step below:

| Step | Activity |
|------|----------|
|------|----------|

9. Click the gray Search button. Under the Search Result for section, you will see everyone that, according to the JPAS database, belongs to the organization code you selected. You have two options to add person categories to your PSM Net.
  - a. Option 1- Click on the Add All button at the bottom of the screen. This adds all categories to your PSN Net associated to that searched SMO.
  - b. Option 2- Check the Add box at the far right after each name. Once you have completed a page, click on the Add button at the bottom of the page.

NOTE: Make sure you click the Add button at the bottom of each page BEFORE you move to the next page – if you do not, the names are unchecked by the system. After you click the Add button at the bottom of the page, the same page will “refresh” and add the equivalent number of new names at the bottom of the page that you added to your PSM Net. For example, if you are on the first page and you “add” ten person categories from that page to your PSM Net, when the page refreshes itself, there will be ten “new” person categories listed at the bottom of the page that came from the top of the second page. If you add three of those person categories to you PSM Net, when the page refreshes, there will be three new person categories at the bottom of the page.

Once you have added all person categories you want from the first page, continue on with the remaining page(s) as needed to populate your PSM Net.

If you did not find everyone on your list during this process, most likely it is because the missing personnel are not assigned a category containing your organization. You can also populate your PSM-Net according to SSN (see Practical 06A and Checklist 06A). Once in the JCAVS Maintain PSM Net screen, select Person Categories by SSN and select the correct category.



## Checklist 06A

### Set/Maintain a Personnel Security Management Network

#### Checklist 06A: Adding Person categories by SSN

To add person categories by SSN to your PSM Net follow the step below:

- | Step | Activity  |
|------|---|
| 1.   | Click on PSM Net (column on left) to display the JCAVS Maintain PSM Net screen. Before you begin, check to make sure that the correct SMO and level are indicated in the top left corner under JCAVS Maintain PSM Net.  |
| 2.   | Now to search the JPAS database, click on the Person Categories by SSN radio button.  |
| 3.   | Click the gray add button. You will be taken to the PSM Net Add Person Categories screen. Ensure the correct SMO is displayed. Determine relationship owning or servicing.  |
| 4.   | Type the SSN and select search. The search results will display all categories assigned to this SSN record. Verify the correct SSN and category you are responsible for and check the add box, then Click Save.   |
| 5.   | You have successfully added the category to your PSM net when the screen refreshes with a reason box over the add check box you selected. If you need to verify, click the reason box which should reflect your SMO information. You can continue with another SSN or return to your PSM Net screen by clicking cancel or the PSM NET link from the left main menu. |



## 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 <b>Owning</b> or <b>Servicing</b> 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.



## Checklist 06C

### Set/Maintain a Personnel Security Management Network

#### Checklist 06C: Removing Person Categories from PSM Net

To remove a person categories from your PSM Net follow the step below:

| Step | Activity  |
|------|---|
| 1.   | Log in as a JCAVS User for the SMO that is losing the person being out-processed.   |
| 2.   | Click on PSM Net (column on left). Locate the Person Categories within your PSM Net. Click on the far right check box under the Remove column.  |
| 3.   | Click the gray Save button at the bottom of the page. When the screen refreshes, you will see “Pending Removal” under the Remove column for the person you want to remove. The system will update at midnight EST and the “Pending Removal” notation will be removed. |

NOTE: Before removing a category from your PSM Net. Remove all accesses and separated the category (industry only). Also, make sure the individual does not have a JCAVS account.



## Checklist 06D

### Set/Maintain a Personnel Security Management Network

#### Checklist 06D: Changing the type of Relationship

To change type of relationship with a person category follow the step below:

| Step | Activity |
|------|----------|
|------|----------|

1. Click on PSM Net (column on left). Locate the Person Categories within your PSM Net.
2. Click on the far right check box under the **Change** column. Click the gray Save button at the bottom of the page. When the screen refreshes, you will see “relationship” change under the relationship column from owning to servicing or vice versa. The system will update immediately. Remember the rule dealing with numbers of owning relationships per category by access type. If a reason box is present you will not be able to change relationship.



## Checklist 06E

### Set/Maintain a Personnel Security Management Network

#### Checklist 06E: Out Processing a Category from the Person Summary Screen

To remove person categories from your PSM Net follow the step below:

| Step | Activity   |
|------|--|
| 1.   | Log in as a JCAVS User for the SMO that is losing the person being out-processed.  |
| 2.   | Click on <b>Select Person.</b> , enter <b>SSN or EDI PN.</b>   |
| 3.   | Click the gray <b>Display</b> button.  |
| 4.   | Make sure the correct category is displayed in the <b>Person Category</b> text box. If not, click on the drop down menu and highlight the correct category. Scroll down to <b>Person Category Information</b> section.                                       |
| 5.   | Click the <b>In/Out Process</b> hyperlink and the “ <b>View/Modify In/Out</b> ” Screen will appear.  |
| 6.   | Enter the date (Format: YYYY MM DD) in the <b>Out Date</b> box under the <b>View/Modify Active Relationship</b> section or click on the <b>calendar</b> and choose the appropriate date.   |
| 7.   | Click on the gray <b>Save</b> button and the screen will refresh with the out-process date appearing solid.  |
| 8.   | Click on the gray <b>Cancel</b> button and it will take you back to the “ <b>Person Summary</b> ” screen.  |
| 9.   | Now if you click on your <b>PSM Net</b> and lookup that person, the phrase “Pending Removal” will appear under the <b>Remove</b> heading in the far right column. The system will update at midnight EST and the “Pending Removal” notation will be removed. |

Note: Make sure that you remove all NON-SCI and SCI accesses before removing from PSM Net. Also, if subject is Industry don't forget to separate the category. See checklist 07D.

