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How to Submit a VR within JPAS
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The duration of today's calls, all lines will be in a listen only mode. Today's conference is being recorded, if you have any objections you may disconnect at this time. And now I would like to introduce your host for todays' call Mr. Walter Hayward.

Alright good morning everyone, my name is Walter Hayward and I will be your host today for on the how to submit a visitors request within JPAS webinar. And just to make sure everyone understands that we'll not only be covering how to submit a visit request, we will actually address the receiving end of the visit request as well. But first and foremost I would like to just introduce myself, my name is Walter Hayward as I've said and I've been with CDSE since July of 2009 and I'm here as one of the Personnel Security Instructors and I teach not only the Personnel Security Management Course but also the Adjudications Course as well.

And at this time I'll go ahead and turn it over to Steve and have him walk you through some of the admin side of the Webinar. Thank you Walter, let's go over a few ground rules for this webinar. In the bottom corner of your screen you're going to see the conference call number, the passcode and just as a reminder there is no audio on this and we have a DCL helpdesk number also there if you need to use it. If you need to go full screen, in the upper right hand corner there's a full screen button, just select it. To go back down just select it again back to normal size screen. When we do poll questions you will need to be in the normal size screen. Our Q&A box is over to the right and since everyone is muted if you have questions please use the Q&A box to address the presenter. Down the bottom is a file share box, and we've got today's briefing slides which I highly recommend that you download those now in case we get disconnected from DCO, it's always a possibility as well as some other PDF files that are helpful for this course. This is an example of a poll question, several of these will pop up

throughout the webinar, just click on your answer. And we're going to go ahead and start to do our first poll question, Walter go ahead.

Alright, so thank you Steve, the first poll question we have today is how many times have you sent a visit request? And it looks like we're getting a smattering of answers. And we'll go ahead and give you a couple more seconds and we'll go ahead and close out the poll. And it looks like we pretty much have a little bit of everything in here. We do have quit a few expanse individuals that seems it's easy to say when aren't they sending in a visit request and when they are sending one.

So we're going to cover the basic of everyone's knowledge and we do intend to hopefully teaching you a little something new you haven't know before this webinar. And so with that let's go ahead and go and get into this presentation.

First off let's start with some of the visit requests basics and first off we have the easy question of what is a visit request. This actually addresses one of the questions we got, received before the webinar of what actually is the purpose of a visit request. Well first and foremost the purpose of a visitor request is to inform external agencies that you have an individual from your agency, your unit, or company that is going to visit them, the external agency. So you wouldn't use this say within directorate, within your own agency, that's not the intent of what a visitor request in JPAS would be for. What this does is, it alerts the Security Personnel at that external agency know that there are individuals coming to their agency in order to see classified information. And additionally it validates that need to know for that other security manager. It's kind of letting them know that they're not just randomly showing up at their doorstep asking to see classified information but rather that another security manager is passing the information to them. So the question then becomes after we establish what is a visit request is when to send a visitor request. Generally speaking when we go into and we're talking about JPAS and sending a visit request within JPAS we're generally talking the intent is when classified information is going to be discussed at some level. Now I am aware that there are agencies that are submitting visit requests for unclassified meetings. JPAS doesn't discern between that information, JPAS will

let you send a visit request for any reason. The intent however is for those that are, have eligibility and access because generally those are the individuals that we know for a fact are always populated in JPAS especially when you get involved with industry, you are going to have some individuals that don't have access or eligibility and they're not going to be in JPAS. So that's generally why you, it's only sent for classified purposes. The easy answer is, when it's required if that external agency is asking you to send a visit request you're going to have to send it to them in order to have your individuals gain access or entry into those areas. And to make it as simple on you, the security manager that's sending the visit request and also easier on the receiving end, send it as soon as possible, as soon as you get the request go into JPAS, send it in and it also makes it easier on that other security manager so they can take care of things on their end.

Now, some helpful tips on sending a visit request. And the first bullet you see there is proper POC and we're actually going to launch into our very next poll question right now. And that is who is the POC? So when you're sending visitor requests to that POC box, who ultimately is the POC? Alright it looks like we're honing in on 2 answers and those that are choosing the security professional are now changing their answer to the sponsor. So let's go and close that poll and that actually be the correct answer, the POC generally speaking is the sponsor. So at that external agency, the one that is requesting that our individuals visit them, that's generally who you would put down as the POC. And we'll get a little bit more into details on why that is. So we'll go ahead and move that out and go ahead and move on to continue on the slide.

So when filling out the JPAS visitor request screen you want to make sure you're putting in that proper POC. When you have some of the newer users generally speaking what they will do is they will put that external security manager. Well think about it from an external security manager's point of view. When they receive a visitor's request, they may not always know why they're receiving it but if you put in the proper POC they know the person at their agency that they can contact to verify that your individuals do in fact have a valid reason to be there. Also before you send in a visit request make sure your individuals are updated to the best of your ability within JPAS. So on the personnel updated make sure you

go to their personal summary screen and make sure they have all the correct accesses, make sure their investigation is in scope, all of that basic functioning that you would expect when somebody sends you one. Enter in all of the fields, while there are some that are not necessarily required the more information you can provide the easier you make it on that receiving security manager. Also when you're sending a visitor request double check that you are in fact sending it to the correct SMO or security management office. There are a lot of security management offices that are very similar and there even are some agencies that have multiple SMO's for the same agency and generally speaking for those agencies they may have multiple SMO's but only one is the one that receives the visit request. So make sure you do that, also make sure to select the correct person category. And if you have taken any online training or even come to any of our instructor-led courses you will hear the instructors here say it over and over again that everything we do in JPAS is driven by person category. So by person category mean as individual going on a visit as a civilian, are they going as military, or are they going as industry. So we'll make sure to cover that as we are sending the visit request today.

Now sending the visit request is of course only one half of the equation the other half is retrieving the visits. Not only when we send visits that that other security manager but we may also have some on our end. So in order to retrieve the visit request, all we have to do is we would check our notifications tab and then once we click on that we would then go down to the visit and look for a little magnifying glass to let us know that there's a new visit. All of this we're going to cover when we launch into the virtual. Once we do that, we expand the visit and the most important part of the visit request and retrieving the visit request is to make sure to go to the person summary screen of every single one of those individuals to insure that their person summary screen is correct. Ultimately when we look at information security side the holder of the information is responsible for the protection of information and so part of that would be making sure the individual has it correct investigation that is in scope as well as the correct accesses in JPAS.

So what we're going to go ahead and do now is we're going to go ahead and launch into the virtual training system. This is available to you in STEPP to take the JPAS/JCAVS virtual or if you also come to the instructor-led you will be able to see this in action as well with the instructors here at CDSE which include myself. So what we see here is we see what we affectionately refer to over and over again as the, "I go to jail screen." It lists all of the things that we should not be doing in JPAS and some of the, their basically letting us know that we are being monitored. So if you scroll down to the bottom of the screen, and click on OK, it'll take us to the log-in screen. Now this is a little bit different than the screen you're going to see in real life and this is because the training system does not utilize tokens or PIVs or PKI so we just have a student login. So it's a little different but it's the same function. In this case you would just be able to login with your token or your common access card. I'm going to select the user and I'm going to click on sign in and once this loads up it will then take us to the choose category level screen. Now if you only have one user level in JPAS you may never see this screen. But if you're an account manager or maybe you manage multiple SMOs you will have to come to the screen so that you can tell JPAS what you are doing in there. So we're going to go ahead and login as level 4, and we're going to click on login, and we're going to go ahead and send a visit request. This is a screen that DMDC has instituted as part of their program to make sure everyone in JPAS they can get in contact to. So we just verify that everything in that is correct and we're going to click on confirm. Now once we get to the JPAS home screen this does look a little different as well from the real system but the only difference that we have between the training system and the live system is the fact that DMDC has decided to use the home screen of JPAS as places where they send notifications to keep all the users abreast of recent things within JPAS. So we're going to go ahead and come over to this left hand side and we're going to select the fourth option down, the create modify visit option. When we click on that screen it's going to add, modify, and cancel the visit screen and we see at the very top of the screen and we also see as with every screen in JPAS on the far left hand side there is a little question mark and no despite what you think it does not mean that JPAS is confused. If you were to click on that question mark it would take you to the tutorial, basically telling you what you are able to do on that

screen. We see that there are currently no visits for us to modify, so what we're going to do, we're going to click on add a visit. It'll take us to visit information screen in which we will populate all of our information. One of the questions we received before this webinar was to talk about the drop down menus and the fact that the drop down menus don't always meet the specific need that we have. So we're going to actually teach you how to work around that issue right now. So what we have to do first is at the required box it has the reason for visit. We're going to choose which ever one is closest to our reason for being there. For instance let's say training in this example.   Where underneath we have the POC and the POC phone, although there is no asterisk and they are not required, it is highly recommended that you put those in so that the receiving security manager can contact the correct person. Additionally this is where we can resolve that issue of the drop down menu not addressing our specific needs. So let's for instance take the point of contact and go ahead put the point of contact name. Now since this is an open text field I can actually continue this on. So for instance I wanted to list the building number, I could put the building number. If I wanted to list the specific seminar that they are having I can list that as well. So we do have and it's approximately 50 characters that you can put in there that can help further specify the reason your individual is visiting. And of course even though it's not a required field we do highly suggest that you put in the phone number that that individual so the security managers can contact that individual that POC.

On the far right we have the first and last day of visit so we're going to go ahead and put those dates in and once we do that we have the box for visited SMO and we have the little button that says select home, we're going to click on that so we can select our SMO. This takes us to the security management office search screen where you can enter in either the code, the SMO code, the SMO name or the SMO location. You can only use one however if you use more than one you'll get a little pop up dialog box that says nothing meets your search criteria. So in this instance we going to go ahead and search for a SMO, I see the SMO is over here that I'm looking for. If you haven't taken any previous JPAS training, know that anything blue and underlined in JPAS is a hyperlink, you click on it and it will do something, in this case if I click on the whiskey two sierra ceria uniform alpha

alpha four (W2SUAA4) it'll select that SMO and it will actually take me back to that previous screen. As we can see the visited SMO is now populated. If I happen to make a mistake it's not a big deal, you would just click on the select SMO again and select the correct option.

We look down and in the visit area we see that we cannot add visitors yet and it tells us we must first save the visit. So we scroll down a little bit lower on the screen, we see the JPAS auto default to the "add visit" radio and we're going to go ahead and click on save and once we click on save the screen will refresh and we now have an add a visitor button. So what we're going to do is we're going to go ahead and click on that button and it will then take us to the person category search screen. At this point we can either enter in the individuals social security number or their DoD EDI PN number. Which quick way of notifying that at least for government civilians and military would be it's the number on your common access card that identifies you without having to utilize your social security number.   In this instance in the training exercise we're going to go ahead and just use the fake social security number that we have for all of our files in the JPAS training system, we're going to enter in that social security number and we're going to click on search. Once we click on search it'll list the individual that we have selected that matches that search criteria of the social as well as any person category that they have populated in JPAS. We would select the one that we would need the most and so in this instance I'm going to select National Guard, that they're going in their National Guard category and not their civilian. Once I do that, I would just come down to the bottom the screen and I would click on add, this screen will refresh. As you may have noticed on the right hand side you have instead of check boxes, it has a reason box, and the real reason is if you just click on it to want to know the person is already on a visit and JPAS isn't going to allow you to add them again. At this point if I needed to add additional individuals I would put their social security number up on top, I'd click on search and select the correct person category and I would continue doing that for all the individuals on the visit. In this instance we're just going to keep it on this one and since I've already added the individual skip back to the previous screen, all I have to do is go down here and click on cancel and it'll take me back to the previous

screen. As I sit here looking back at the visit information screen I can now see I have all my information for the visit listed up top, I also have my visitor, I have her name, social security number, if there was a DoD EDI PN I'd have it. In the middle of the screen I also have the person category and on the far right I have 2 boxes, one saying permanent certification and one saying remove. Big misnomer in security in general is that if you're sending a visitor request for a year you must mark permanent certification. There is no DoD policy stating what permanent certification is. Permanent certification is a policy that agencies determine on their own that may set some visitors apart from the general visitors. So for instance if Ms. Category needs to go on a visit and there is nothing she needs to be special maybe they might say just send a visit request. But if she was going on a visit and she needed access to the super top secret lunch room and they needed to give her a different badge they would ask me to click on permanent certification so that when they receive the visitor request on their end they would know to give her the special colored badge and let her into the really cool lunchroom. That is just a complete example that I completely made up to be sarcastic. Alright so if I needed to I would just check the little box and if I needed to I would then come down and see instead of add we're auto defaulted to the middle radio button to modify visit and I would just click on save. And whenever I'm done with this I can just hit cancel and it takes me back to the add modify cancel a visit screen. When I'm on this screen you'll see the visit I created, the visited SMO, you'll also see the SMO name which is hyperlinked, we have the SMO level, the start and end of the visit and how many visitors are on that screen. If I ever need to go back to modify this visit all I have to do is click on the hyperlink and the hyperlink will take me back to the visit in which case I can either if I needed to remove the individual I could come over here and click on that remove box and remove the individual or if that visit was cancelled I could come back to this radio button over here and click on that and I would click on save and it would then cancel the visit. So this covers the first half, this covers how to actually send the visitor request.

So let's go ahead at this point and go into the second half which would be retrieving the visit request. Some I'm going to go ahead and log out here and

we're going to go ahead and log in. Originally I was wearing the hat of the sender, now I'm a completely different person even though I sound the same and I'm going in as the person retrieving the visit. So I come in, I would log in since we're supposed to log into JPAS every single day and for those of you who say that they do, not everyone does I know this. Alright, so I log in as level 2, I come in, we see the screen we've seen before, it's just basically verifying I am who I am and all my information if DMDC needs to find me and I would do whatever security work I need. Now for the receiving as I said before the notification tab if you look right down here after that create modify visit is the notification tab. I click on that, we see it come down, and unfortunately we don't have the visits there. So let's pretend I did have a visit. If I did have a visit, I would click on that button and I would have the visit date, I would also have the visited SMO, I would have the reason for visit, I would have the POC, the POC phone and the status. Actually let me go see if I can log in as another JPAS user and see if I made a mistake on my end help me see that visit request real fast, if not we will just have to pretend. There's a visit request. So there's a visit request, I apologize we do have a number of users and sometimes they get mixed up. So we have the visit date, as you can see clearly here we have the visited SMO, I have the reason which is the training and remember we talked earlier how the training that pulled them in wasn't specific enough. If I look under my POC I see the name of the POC as well as the building number and the reason why they're visiting and I have the POC number as well. So that helps me as the receiving security individual, so I know I can contact Mr. Smith and ask him if he does in fact have a meeting set up and let him know the individuals are good to go. If I needed to contact that security management office, over on the right hand side I have a hyperlink, I click on it, it would give me the information in order to contact that security management office. This is why it's very important for all individuals within JPAS to make sure you keep all of your SMO information correct because there are people that are depending on this information to let you know if there's something wrong.

We come over to the far right we see 2 boxes, expand visit and remove from display. I click on expand visit, I click on confirm and low and behold there's the individual that's come on a visit with their social security number, name, the

category, Perm cert if I happen to ask if they needed to be Perm certed and I also have their accesses. So at this point if I know that this is a secret meeting I know for a fact that this individual isn't good to go. But even if they did have let's say non-SCI access and it says secret I still would need to go their person summary screen before I can authorize this individual. Because one of things I do not see on this screen is I do not see their investigation to be able to tell if it's in scope and also I don't know if maybe there was an incident report submitted or where their eligibility, or are there any open cases on this individual's log. So it's always suggested you go to the actual person summary screen and all you have to do to get to that is you come over here and you click that little blue underlined social security number and it will take you directly to that person summary screen.

Now let's give a real life example that does happen. Let's say you've given an individual you've given them all the training you think they need to get them into JPAS. And they come in, they see the notifications, they see the little magnifying glass next to visit, they see the visit and they say ok cool and they say you know what let me go ahead and clean this up cause it always looks better when there's nothing in my boxes. And they click on that remove from display and they click on confirm. Well the question now becomes that visit is now gone.   So let's go ahead and if you're in full screen go ahead and pull out a full screen now and let's go to over very next poll question.

And our next poll question is, what do you do if the visitor request isn't in your notifications? And I'm going to go and give you a little chance to vote on that. Looks like we have at least a couple people with the freak out method. Have quite a few people, about 20 of you guys going with have them contact their security manager and we have most of the people going with just check their person summary screen. Now the only weakness with the checking their person summary screen is that it doesn't validate that they actually have a need to know from their security office. Even though I'm showing it here that the visitor request had gone there actually is one way that you can still retrieve that visit request and I'm going to go ahead and show that to you now. So let's say we have an individual, they come in, let's say it's a full bird Colonel, they come into your office and they say I am here for the classified meeting, I go into my visit

request and I see no visit and I say no there is no visit request here for you sir. They say there is, I say there isn't and we go back and forth for 15 minutes until I remember what was just talked about in the webinar today. And I go and I click on the select person screen, I put in that individual's social security number and I come down to the second radio button that I'm sure that the vast majority of you have never looked at until today and it says display abbreviated person summary with visit information. I'm going to click on that radio button and then I'm going to come down here and I'm going to click on display and when I come in here you're suddenly wondering why did Walter bring me to this page? Keep in mind what person category did we send this visit request under and if you recall we sent the National Guard category. And remember everything we do in JPAS is driven by person category. I come up to the top of the screen, I click on the pull down menu, I go to the correct person category and if you see on the bottom of your screen, you will see the visit request that was sent on behalf of that individual. Now, the down side is it didn't really pull the whole visit request but it can help me at least with this individual. So let's say in that instance where I have the Colonel in front of me that we're arguing whether or not they had the visit request that I could then look that Colonel squarely in the eye and say your security manager just sent a visit request, your free to pass.

Now if there are multiple individuals on that visit I would have to then check each social security number in the correct person category in order to verify that there was in fact a visit request sent on the individuals.

Alright and let me see we have another question that I actually want to make sure we address that we've received before the webinar and it was saying for VARs can you submit for longer than a year? With JPAS, as far as a visit request, will let you submit longer than a year. However with the wording here regarding VAR I'm assuming that it's meaning that it has to do with Industrial Security in which the NISPOM states as far as VARs annually so you would have to check with any specific policies that operate within that. So even though JPAS allows you to submit it longer local policies may want it for only a certain period of time. And the other question has is because if you look at this screen, we're looking at the accesses that they are granted, that the individuals asking is COMSEC brief going

to be added to the indoctrination area and at this point there's we have no indicators that COMSEC is going to be added at any point.

And so this is pretty much everything that you can do with visit requests. The important part is making sure the person summary screen is up to date which does happen occasionally and the most common thing is as a sender of the visitor request go ahead and make sure to put in as much information. Even though it's not all required the more information is better. Think about what you would want an individual sending you a visitor request to have and that's what you should have to be sending to other individuals as well.

So at this point I'm going to go ahead and turn it back over to Steve to go ahead and launch it back into stopping the screen share and go ahead and go to the very last poll question that we have which is please rate how confident you are in sending and receiving visit requests? And we're going to go ahead and give you a few minutes to fill that out, hopefully this was a very helpful webinar for some of you who weren't as confident before and it looks like a vast majority of you are very confident in sending visit requests now. We do have one that is asking what a visit request again I do encourage you to stay we'll go ahead and just go over it again right now. No I'm kidding. We will have another this afternoon go ahead and feel free if you were unsure on this one to go ahead and submit again and listen to this afternoon's webinar. And I also want to make everyone aware that we do have in the file share box we do have some of the job aids such as how to modify, cancel a visit and those take you step by step through adding, modifying and canceling a visit. And also down there we have a practice exercise that we utilize in the class that you can have your individuals try in the virtual training. Which leads me into the virtual training, you can use the same virtual system that I showed you today and it would be the JPAS/JCAVS virtual training for security professionals and that's PS123.16 as well as the corresponding exam. Now the exam is a completely separate course as seen in STEPP so to get your certificate you would actually have to register for the exam and take the exam which is the .06. We also have the Personnel Security Management course, PS212.01, and if you have any questions remaining please feel free to submit them and after this webinar what we're going to do is we're going to gather all of the questions we

have and go and post them on the CDSE website and also if you want to and you need help in the future you can always feel free to e-mail the Personnel Security Team at JPAS.training@dss.mil. So Thank You and hope you guys have a great rest of your day.