Initiating a Request

For Initiators Only

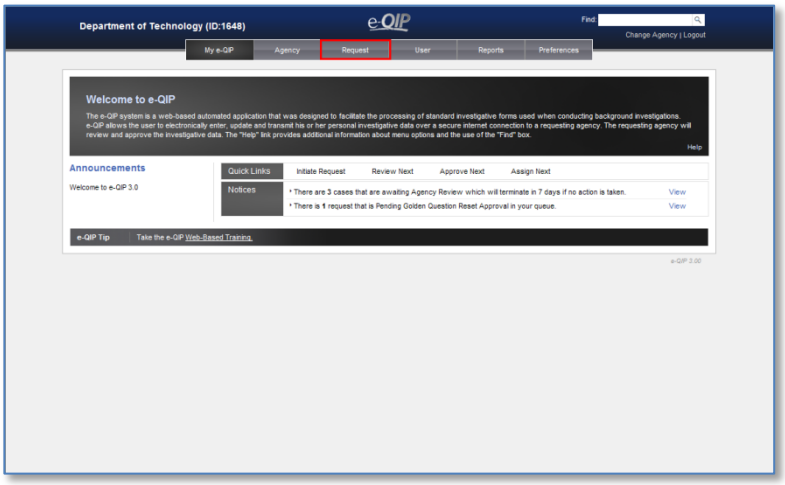
Obtain Applicant Information

You will need the following information to initiate a request for an applicant:

- Social Security Number (SSN)
- Full Name
- Date of Birth (DOB)
- Place of Birth (POB)
- Standard Form (SF) to complete

Initiate a Request for the Applicant

1. Navigate to the **Request Overview** screen by selecting **Request** in the top navigation bar



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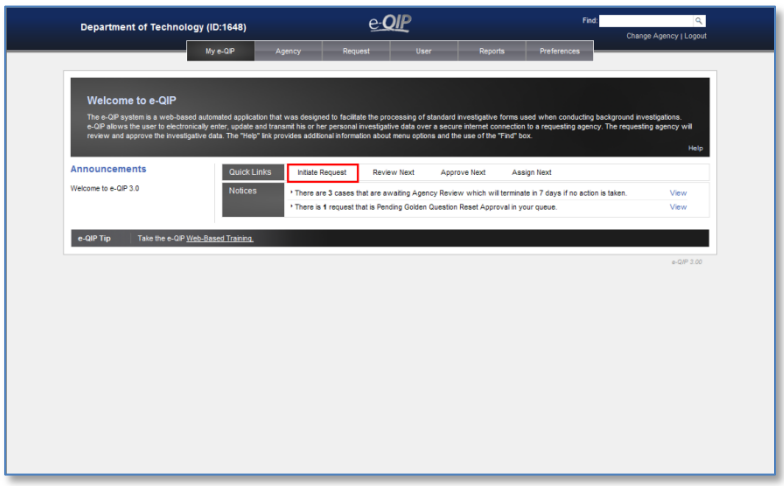
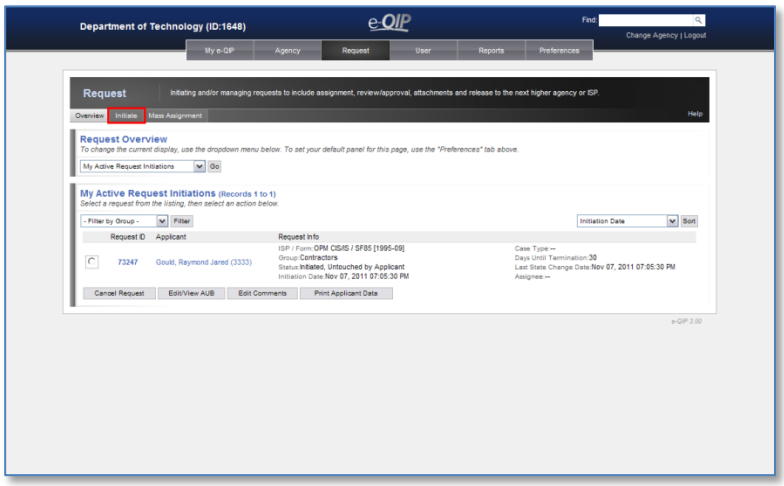
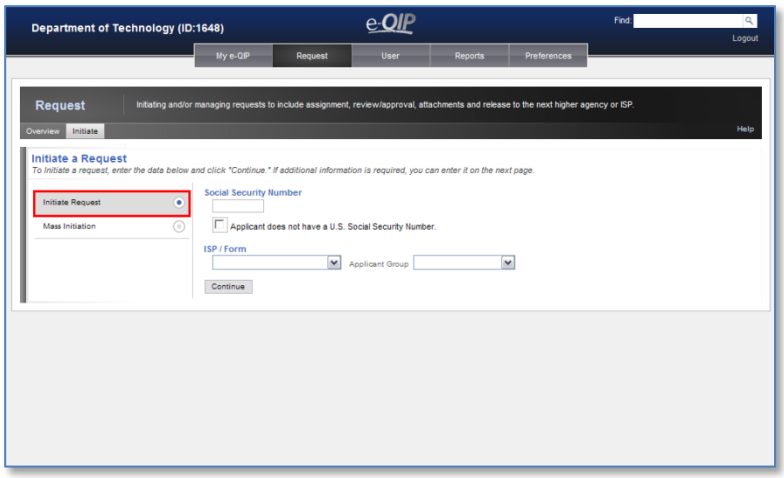
Note: From the **My e-QIP, Welcome to e-QIP** page, you may also select the **Initiate Request** quick link to go directly to the **Initiate Request** screen.



2. On the **Request Overview** screen, select **Initiate**



3. Select **Initiate Request** in the side navigation bar



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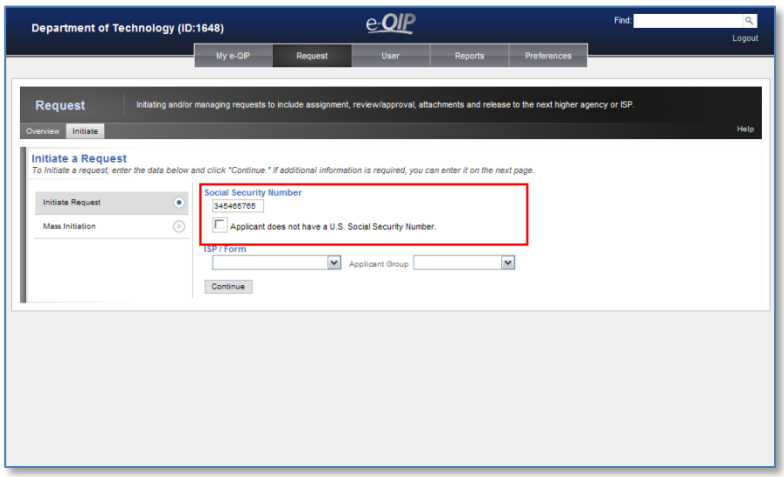
4. Type the applicant's SSN into the **Social Security Number** field

   Note: Double-check the SSN to make sure it is entered correctly. Once you submit the request, you cannot edit the SSN.

5. If an applicant does not have an SSN, select the checkbox for "**Applicant does not have a U.S. Social Security Number**."

   Important! For applicants without an SSN, you must send them the Request ID so they can log in.

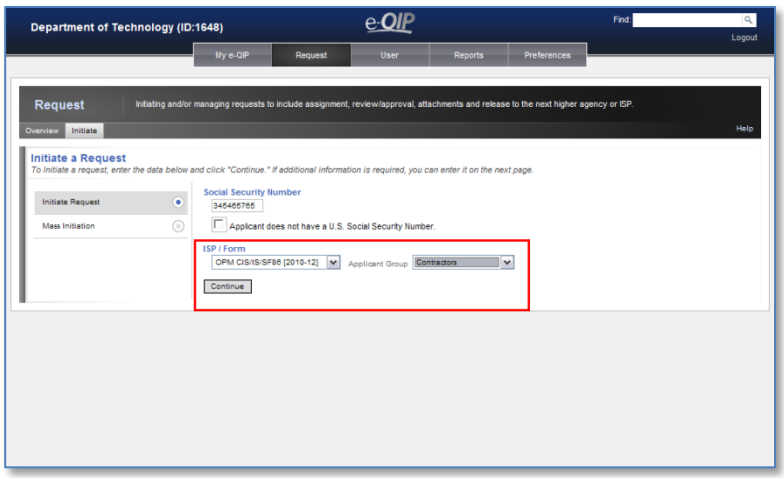


6. Select the Standard Form the applicant must complete in the **ISP/Form** drop-down list box

7. Select a group in the **Applicant Group** drop-down list box

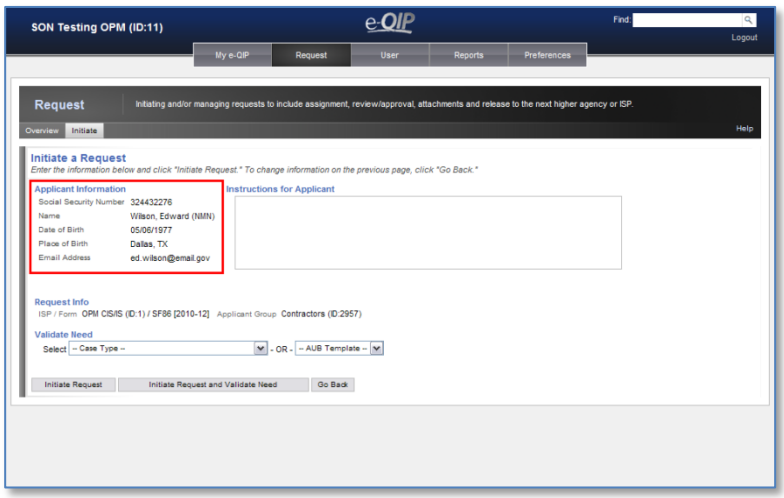
   Note: The group determines which Reviewers and Approvers will process the form after the Applicant submits it to the agency.

8. Select **Continue**



9. If the applicant is already in the system, the **Initiate a Request** screen is displayed along with the applicant's existing demographic information. Validate the information. If anything needs to be changed, contact your agency's e-QIP User Administrator

10. Once you have validated the applicant's demographic information, proceed to the Validate Need section below



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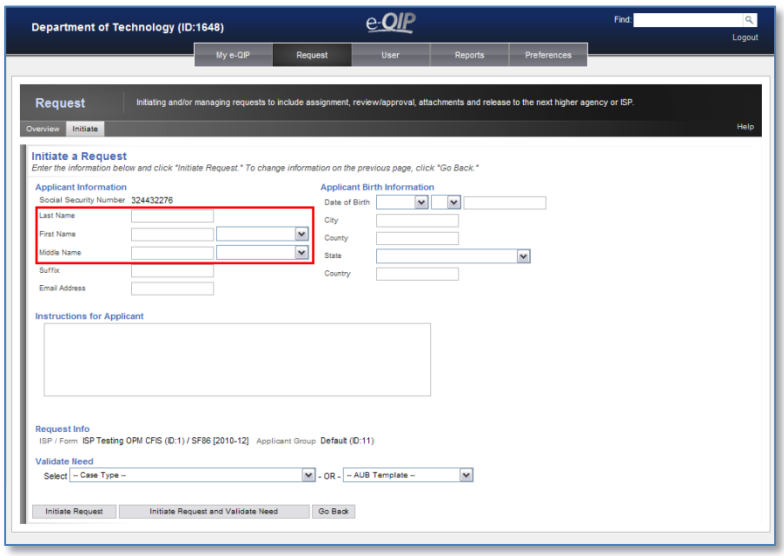
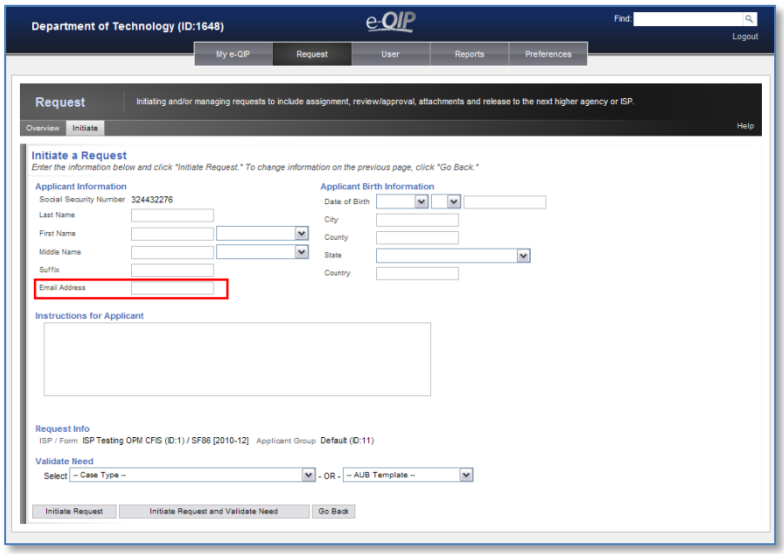
11. If the applicant is not currently in the system, the **Initiate a Request** screen is displayed with blank data fields
12. Type the applicant's full name into the fields provided
    - Pay special attention to **Last Name** and **First Name** as these are often switched
    - Use proper capitalization
    - If the applicant has no middle name, leave the field blank. Select **No Middle Name** from the drop-down list to the right of the **Middle Name** field

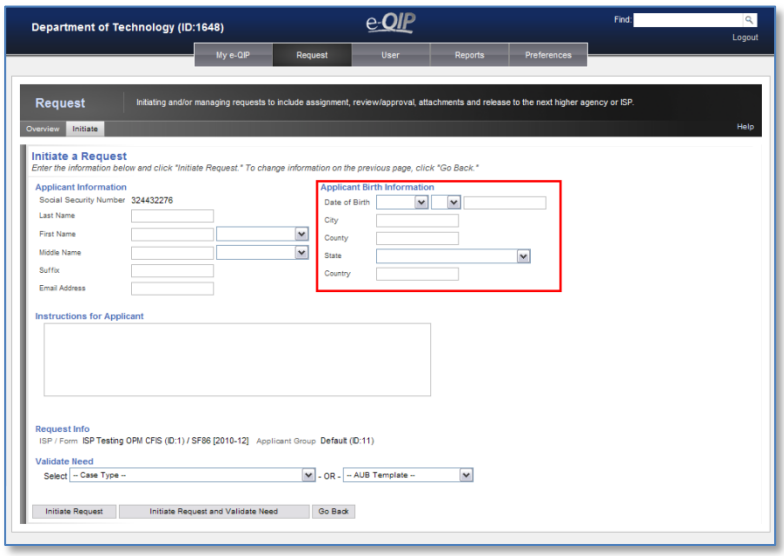


13. Type in the applicant's **Email Address** if known

    Note: e-QIP does not utilize automatic email notifications at this time.

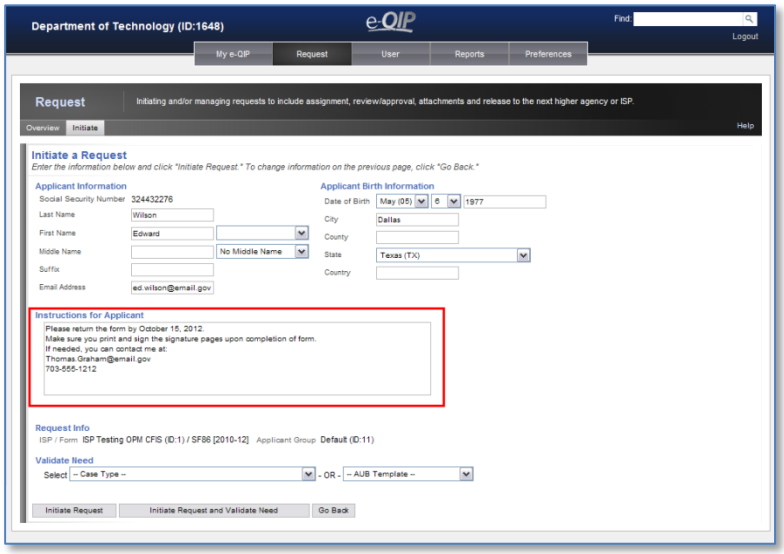


14. Select the applicant's **Date of Birth**
15. Type in the applicant's **Place of Birth**
    a. Type in the **City**
    b. Type in the **County** if known
    c. If the applicant was born in the U.S., select the **State**
    d. If the applicant was born in a country other than the United States, type in the **Country**. Otherwise, leave blank



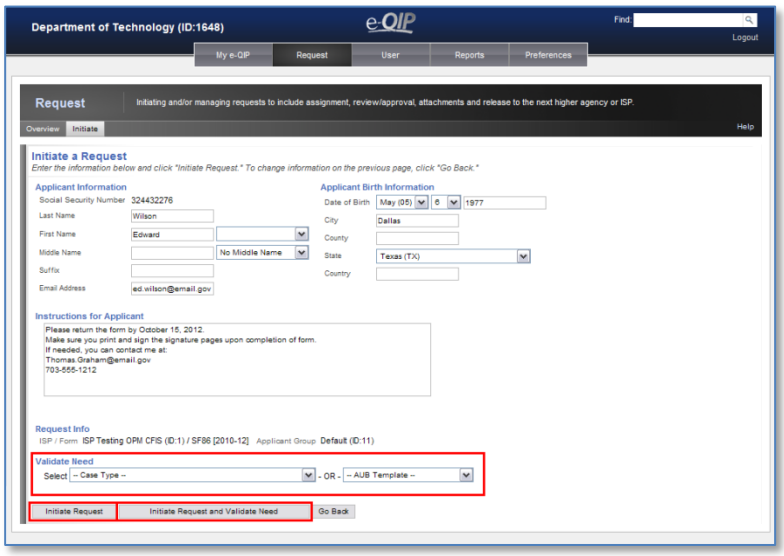
16. Add additional instructions in the **Instructions for Applicant** field. Include:
    - Where to mail the signature pages
    - Applicant's deadline for completing the form
    - Your contact information

    Note: Instructions display for applicants in e-QIP after they successfully log in. They also print on the archival copy.



17. When you are ready to initiate the request, and depending on your agency's requirements, you may either:
    - Initiate the request without validating the need by selecting **Initiate Request** or
    - Initiate the request and validate the need by selecting a **Case Type** or **AUB Template** from the appropriate drop-down list box, and then selecting **Initiate Request and Validate Need**

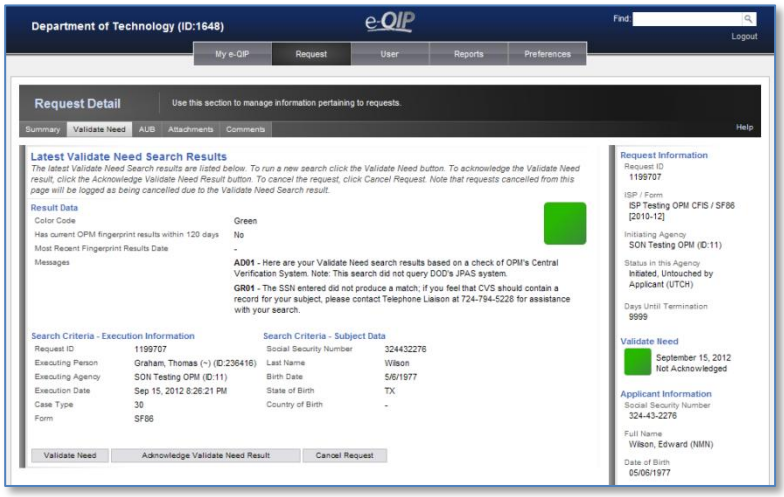
    Note: The Validate Need feature can be turned on and off by the agency administrator. The default selection is on.



Validate Need

With the Validate Need feature, e-QIP checks the Central Verification System (CVS) to see if an investigation exists that could meet or exceed your agency's need. e-QIP displays the results of the search on the **Validate Need** page.

Although no specific Security and Suitability Investigations Index (SII) information will be available in e-QIP via CVS, a green or yellow indicator will display indicating whether or not an investigation exists that meets or exceeds the level of investigation of the current request.



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Three types of indicators may be displayed for the request:

- A green indicator means that no investigations exist in CVS that closed within 5 years and meet or exceed the level of investigation required. You can simply continue initiating the request. If you feel that CVS may contain a record for your subject, contact the Telephone Liaison Group at (724) 794-5228 for assistance.
- A yellow indicator means that an investigation exists in CVS that was closed within 5 years and meets or exceeds the level of investigation required. Check CVS or consult with your security office before proceeding.
- A gray indicator is displayed if no validate need check was conducted within e-QIP.

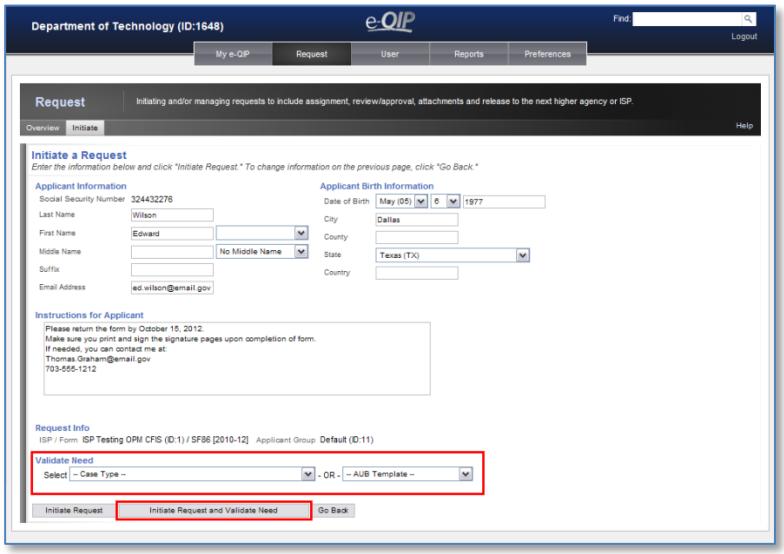
Indicator	Meaning
	Green and yellow codes returned from CVS, not yet confirmed by agency user.
	Green and yellow codes returned from CVS, confirmed by agency user.
	Green and yellow codes returned from CVS, now invalid based on current request information. This will show when Case Type or a piece of applicant information has change since the last Validate Need Search was conducted.
	Grey shows when the request has never had a Validate Need search conducted on it.

Symbols in the flag indicate whether the validate need search was “acknowledged” by an agency user or whether the case type may have changed throughout the life of the e-QIP request, rendering the original results of the validate need search invalid.

1. To validate need, first select either a **Case Type** or an **AUB Template** from the appropriate drop-down list box on the **Initiate a Request** screen

   Note: If you select a Case Type, e-QIP will search CVS for an investigation that closed within 5 years that is equal to or greater than the level of investigation you selected. If you select an AUB Template, e-QIP will use the case type in the AUB template as the case type for which it is validating need.

2. Select the **Initiate Request and Validate Need** button



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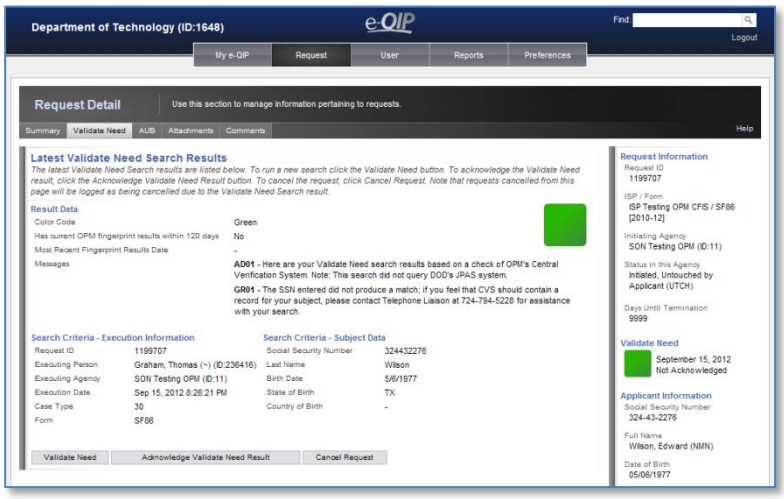
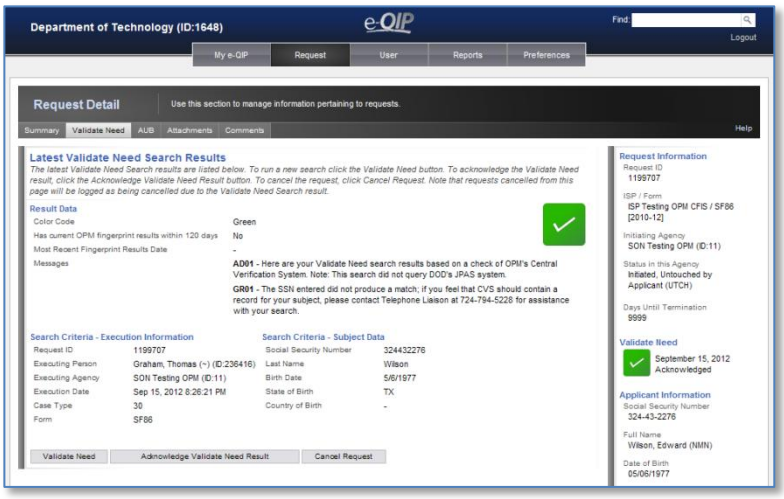
3. Note the indicator and take appropriate action based on the search results and your research:
   a. If an investigation exists that meets your agency's needs and you wish to cancel the request, select **Cancel Request**. You have completed the procedure
   b. If you wish to continue with the request, select **Acknowledge Validate Need Result** and continue below



A checkmark displays in the indicator to show you have acknowledged the validate need results. Continue to the Add Agency Use Block Data section below.



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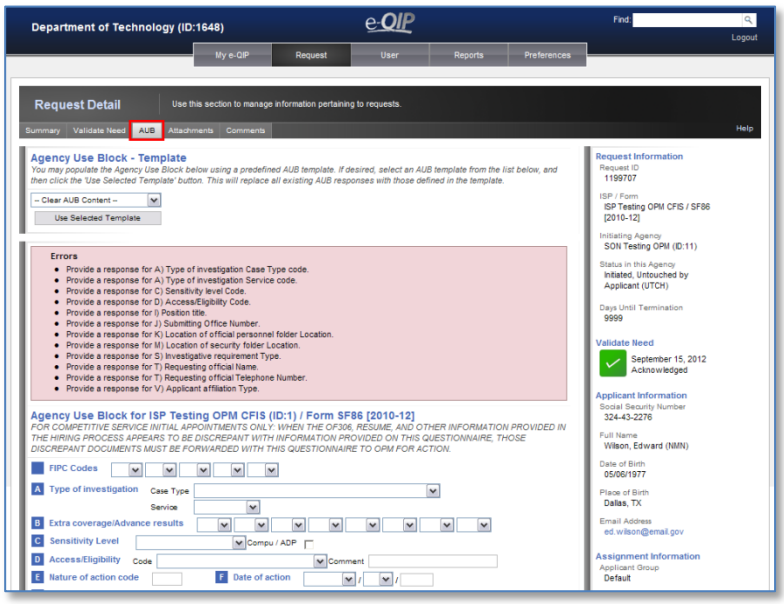
Add Agency Use Block Data

1. Select **AUB** in the sub-navigation bar to navigate to the **Agency Use Block** (AUB) screen

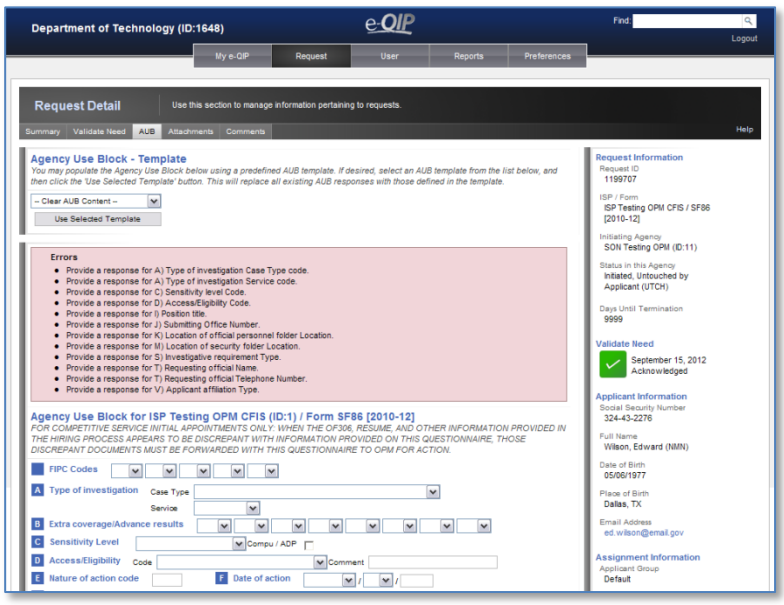
The **Errors** section shown on this page indicates the AUB fields that must be completed before the request is released from the agency.

The Request ID is also generated and is provided in the **Request Information** section on the right side of the screen.



2. Do you have templates available in the **Agency Use Block - Template** drop-down list?
   a. If Yes:
      i. Select a template from the drop-down list
      ii. Select **Use Selected Template**
   b. If No, go to Step 2 below

   Note: Templates will be available to your agency only if the Agency Administrator has created them. If you do not have any applicable templates, you'll need to enter data in all the fields. See Step 2.



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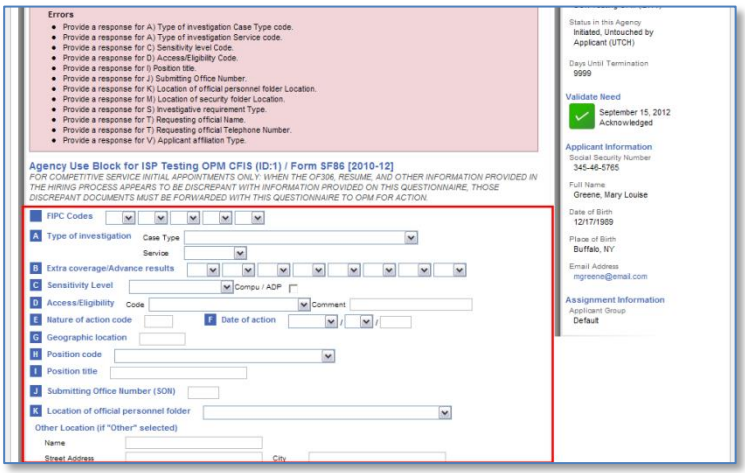
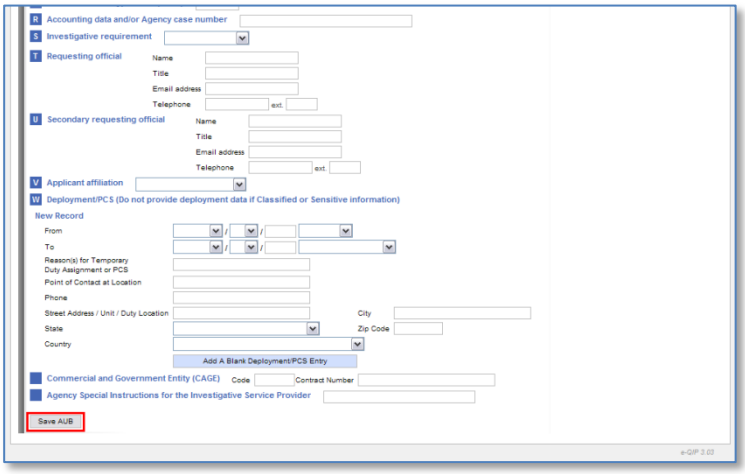
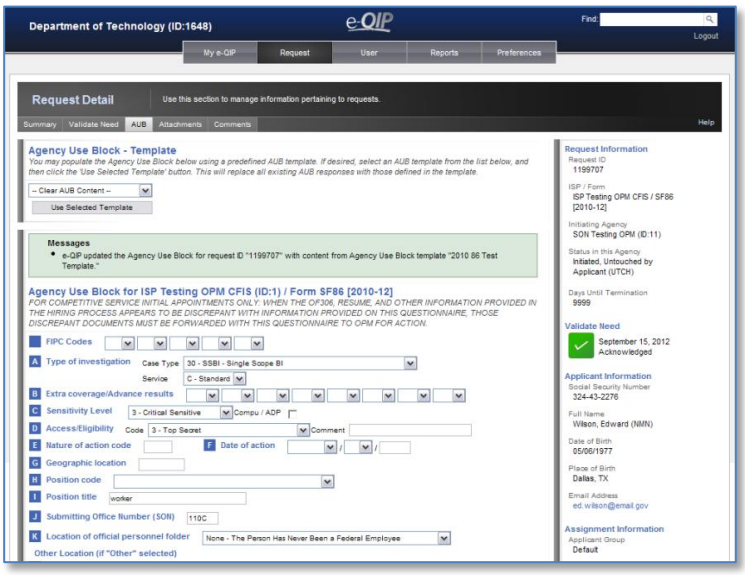
3. Add or edit data in at least each of the AUB fields listed in the Errors message box

4. Complete additional fields as appropriate for your agency



5. Select **Save AUB**

Note: If you validate need using an AUB template, e-QIP will pre-fill the AUB fields based on the template. Double-check the fields and make changes as needed. If you do make changes, select **Save AUB** to save them.



The AUB data is saved. Make sure you tell the applicant to log into e-QIP and complete the form.