



**Completing your  
Investigation  
Request in e-  
QIP:**

***Guide for the  
Standard Form  
(SF) 86***

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## 1 Introduction

This Quick Reference Guide is provided to assist you in completing the Questionnaire for National Security Positions Standard Form 86 (SF 86), using the Electronic Questionnaires for Investigations Processing (e-QIP) system. Please follow this guide step-by-step to ensure that your questionnaire is completed properly.

e-QIP is a web-based automated system that was designed to facilitate the processing of standard investigative forms used when conducting background investigations. e-QIP allows you to electronically enter, update, and transmit your personal investigative data over a secure internet connection to a requesting agency. The requesting agency will review and approve the investigative data.

### 1.1 What is the SF 86?

The Standard Form 86, "Questionnaire for National Security Positions" is intended specifically for use in requesting investigations for persons seeking to occupy positions designated as National Security "Sensitive."

The SF 86 is a permanent document that may be used as the basis for future investigations, eligibility determinations for access to classified information or to hold a sensitive position, suitability or fitness for Federal employment, fitness for contract employment, or eligibility for physical and logical access to federally controlled facilities or information systems. Your responses to this form may be compared with your responses to previous SF 86 questionnaires.

### 1.2 Why am I required to have a background investigation?

The U.S. Government conducts background investigations to determine if applicants or employees meet the suitability or fitness requirements for employment, or are eligible for access to Federal facilities, automated systems, or classified information. All persons must be properly investigated and favorably adjudicated to hold a position as a Federal employee, consultant, volunteer, contractor personnel or military personnel. Investigations and favorable determinations are also a requirement for being issued a credential and access to classified information.

The scope and type of background investigation varies depending on the duties and access requirements for the position, as does the amount of time it takes to be completed. The employing or sponsoring agency, that initiated your investigation, is responsible for determining the appropriate level of investigation to be conducted based on current rules and procedures, not NBIB.

### 1.3 Is completing the form mandatory in order to get a position in the federal government?

Providing the information requested on the form is voluntary. However, if you do not provide the information requested, it may adversely affect your ability to gain a national security position or receive eligibility to access classified information as may be required by the position for which you are applying.

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Be completely honest and forthright when answering all questions on the SF 86. If necessary, provide clarification or an explanation for how you answered a particular question in the Optional Comment sections provided in e-QIP.

#### **1.4 How much time do I have to complete the form?**

The agency sponsoring you will establish the amount of time you have to complete your form. Be as timely as possible in completing your investigation request. You should earnestly try to meet the deadline your agency has established for you to complete this form.

Public burden reporting for this collection of information is estimated to average 150 minutes per investigation request, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

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## 2 Protecting Your Privacy

Security is a primary concern when handling personal information. This concern has been addressed by specific Federal guidelines implemented to safeguard Personally Identifiable Information (PII). PII is defined as information that can be used to discern or trace a person's identity; and alone, or combined with other information, can be used to compromise the integrity of records relating to a person by permitting unauthorized access to or unauthorized disclosure of these records.

Numerous security measures have been built into e-QIP to prevent unauthorized access to your information to include:

- e-QIP applicants can opt into "Two-Factor Authentication," which is an additional layer of protection that can be established through the use of an application (app) downloaded from a Smartphone or a desktop application.
- e-QIP uses layered security to stop hackers and limit access to personal data. Transport Layer Security (TLS) and its predecessor, Secure Socket Layer (SSL), are cryptographic protocols that provide security for communications over networks such as the Internet. TLS and SSL encrypt the segments of network connections at the application layer to ensure secure end-to-end transit at the transport layer. All internet-based data transmissions are encrypted using encryption provided through common browser SSL technology.
- e-QIP requires that TLS 1.0 be enabled in the user's browser. Without this setting, users receive a "Page Cannot be Displayed" error message.
- During the initial log in to e-QIP, each user must first answer a series of unique questions about basic demographic information they provided to the sponsoring agency, along with a 14-character Registration Code. After successfully answering these questions, users must create a unique username and password. Finally, they must create a set of three challenge questions that they will need to respond to in the event they need to reset their password. \*If users have issues with logging in, they must contact their sponsoring agency for assistance and not call OPM directly.
- Only persons with active investigation requests can log in to e-QIP.
- e-QIP has been tested through the National Institute of Standards and Technology (NIST) Certification and Accreditation process and is compliant with all requirements.

It is NBIB policy to ensure that all information technology (IT) systems that collect, maintain, or disseminate information in an identifiable form have Federally mandated controls in place to protect and prevent the breach of PII.

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### 3 Before You Begin: What do I need in order to complete the SF 86?

To complete your e-QIP investigation request form you will need access to a computer with an internet connection and a web browser. For most of the categories listed below, you'll need information going back ten years. In most categories the instructions will state that you should not list information before your 18<sup>th</sup> birthday unless necessary to provide a minimum of two years history. Please follow the specific instructions for each question on the SF 86. You should also gather the following information:

- Proof of citizenship status for yourself and your immediate family, spouse or cohabitant, if applicable, such as:
  - U.S. Passport
  - Certificate of Citizenship (N560 or N561)
  - Naturalization Certificate (N550 or N570)
  - Certification of Report of Birth Abroad (DS1350)
  - Certification of Birth (FS545)
  - Consular Report of Birth Abroad (FS240)
- Or proof of Legal Status within the U.S., please include expiration date of these documents.
  - Permanent Resident Card (Green Card I-551)
  - Employment Authorization Card (EAD Card I-766)
  - U.S. Visa
  - I-94
  - Unexpired Foreign Passports

*Note:* Providing a copy of these documents by uploading an electronic or scanned copy of them into e-QIP during the completion of you form can save you and your sponsoring agency time. You may be able to obtain assistance with lost or unknown information at the [U.S. Citizenship and Immigration Services website](http://www.uscis.gov).
- Employment history
  - Current and previous work location addresses
  - Supervisor names, addresses, and contact information
- Personal residence(s)
  - Name, address, and phone number of a person who knew you at each address.
  - Note: All contact information must include a physical address. PO Boxes are unacceptable. APO/FPO is allowed. For assistance in locating address information refer to: <http://maps.google.com>
- Three personal references
- Educational Institutions
  - Dates of Attendance
  - Address
  - If attendance was within the last 3 years, you will need a name address and contact information for a person who knew you at the school (instructor, student, etc.).
- Relatives' citizenship information (see above for list of applicable documents), aliases, employers, and foreign activities
- Selective Service ID number, if applicable. If you need your Service Number call 1-847-688-6888 or visit <http://www.sss.gov> to obtain it

## 4 Getting Started

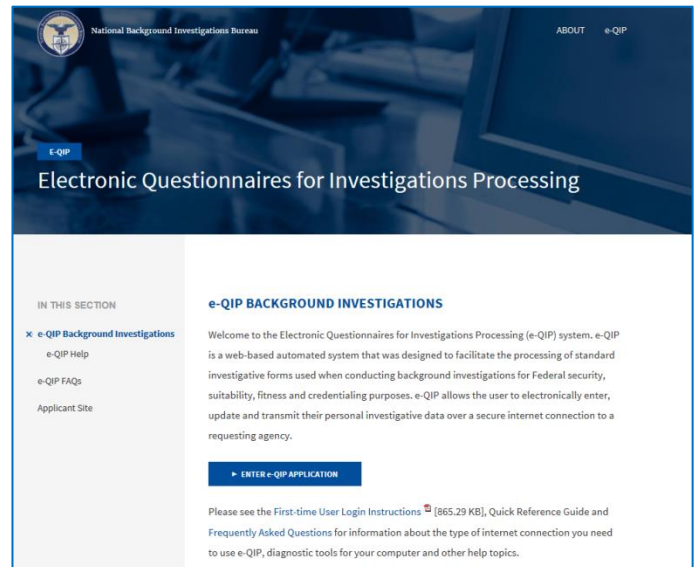
### 4.1 Access the e-QIP Login Screen

To begin completing the SF 86 in e-QIP, you must first access the e-QIP login screen.

1. Open your internet browser and navigate to the following URL:  
<https://nbib.opm.gov/e-qip-background-intestigations/>

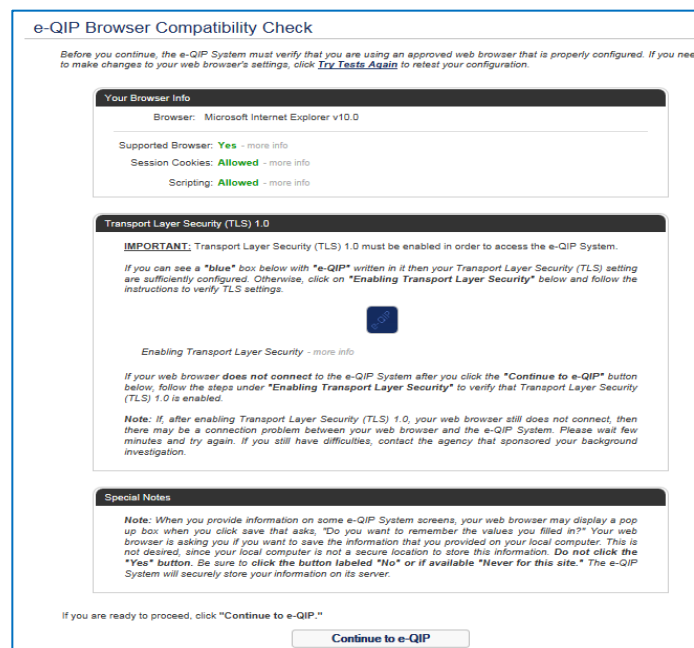
The e-QIP Application Page will appear.

2. Select the button labeled **Enter e-QIP Application**, or select the **Applicant Site** option in the left navigation bar



3. e-QIP automatically tests your browser for compatibility and displays the results on a page entitled "e-QIP Browser Compatibility Check."

If you have followed the steps included in this guide to configure your browser, you should show a green response for each option. If any options show red, follow the on-screen instructions to change your browser settings. E-QIP will not display unless these settings are enabled.



4. Select **Continue to e-QIP**

5. If a Security Alert dialog box displays, select **Yes**

**Note:** If an error message displays saying "Page Cannot Be Displayed," you need to enable TLS 1.0.



## 4.2 Log into e-QIP

Once you have accessed the e-QIP login screen, follow the steps below to log into e-QIP.

### 4.2.1 Initial Login Steps

1. Upon arrival to the e-QIP Login screen, you will be presented with a warning concerning the use of free wireless internet connections (Wi-Fi) while filling out your investigative forms. Read the warning and then click, **OK**.

Note: If you decide you do not want to fill out your form using your current connection, you may simply close the browser window and access e-QIP at a time when you are connected via a non-public connection.

2. If this is your first time in e-QIP, or if you have recently had your account (password) reset by your sponsoring agency, select **Register for Username and Password**

If you have already created an e-QIP account in the past type in your username and password, select **Submit** and go to [section 4.2.5](#) of this guide.

**Note:** If you have forgotten your username you will have to contact your sponsoring agency, but if you have forgotten your password click the **Forgot Password** link and answer your previously chosen Challenge Questions to reset your password. If you cannot remember the answers to your Challenge Questions you will have to contact your sponsoring agency.

The e-QIP login and registration screen. At the top, it says "Help" on the left and "OMB No. 3206-0005" on the right. The main heading is "The United States Government U.S. Office of Personnel Management (OPM)". Below this is a large block of small text containing a disclaimer and terms of use. There are two main sections: "I already have an e-QIP account." and "I do not have an e-QIP account." The first section has fields for "Username" and "Password", a "Forgot Password" link, and a "Submit" button. The second section has a "Register for Username and Password" button.

3. If you have a Social Security Number (SSN)
  - a. Type your SSN into the **Social Security Number** field
  - b. Press the **[Tab]** key or use mouse to move to the three separate SSN fields
  - c. Select **Submit**

The screenshot shows a registration screen with a blue header containing 'Help' and 'OMB No. 3206-0005'. Below the header is a light blue box with instructions: 'The following screens will guide you through the process of registering an account in the e-QIP system. Before beginning this process your sponsoring agency must have already initiated an investigation request for you. If you do not have an active investigation request you will be unable to proceed. If you have a U.S. Social Security number, enter it into the "Social Security Number" fields below, then click the "Submit" button to continue. If you do not have a U.S. Social Security number, enter the e-QIP request number into the "Request Number" field below, then click the "Submit" button to continue. If you do not know your request number contact your sponsoring agency.' Below this text are two input fields: 'Social Security Number' (with three separate boxes for digits and dashes) and 'Request Number' (a single box). An 'OR' is placed between the two fields. At the bottom, there is a 'Submit' button and a note: 'Note: If you have reached this page in error, click "Return to Login Screen" to try again.'

If you do not have an SSN

- a. Type your Request ID number into the Request Number field
- b. Select **Submit**

**Note:** Contact your sponsoring agency if you have not received your Request ID number and do not have an SSN.

If you get an error message on entering your SSN or Request ID number, you have either entered the number incorrectly, not yet been initiated in e-QIP, or exceeded the timeframe for logging in after your request was initiated. Please try again. If you continue to experience an issue, you must contact your sponsoring agency for assistance.

#### 4.2.2 Golden Questions and Registration Code

**Note:** To see your answers as you type, check the box, **“Allow me to see my Golden Questions as I type them.”**

1. Type your last name under the question “What is your **LAST name?**”
2. Type your city of birth, as entered by your sponsoring agency, under the question, “In what **CITY** were you born?”
3. Type your four digit **YEAR** of birth (XXXX) under the question, “In what four digit year were you born?”
4. Enter the 14-character **Registration Code** (using all capital letters) that was emailed, or provided to you from the individual who informed you to enter e-QIP. **This 14-character Code will need to be entered in all capital letters.**
5. Select **Submit**

The screenshot shows a registration screen with a blue header containing 'Help' and 'OMB No. 3206-0005'. Below the header is a light blue box with instructions: 'Enter the answer to each Golden Question and the Registration Code provided by your agency, then click the "Submit" button to continue.' Below this text is a checkbox labeled 'Allow me to see my Golden Answers as I type them'. There are three numbered questions with corresponding answer fields: 1. 'Question: What is your LAST name?' with an 'Answer:' field; 2. 'Question: In what CITY were you born? (DO NOT provide the State.)' with an 'Answer:' field; 3. 'Question: In what four-digit YEAR were you born?' with an 'Answer:' field. Below these is a 'Registration Code:' field. At the bottom, there is a 'Submit' button and a note: 'Note: If you entered your Social Security Number or Request ID incorrectly, click "here" to try again.'

### 4.2.3 Create a Username and Password

1. Type a username of at least six characters into the **Username field** and type it again in the **Confirm Username field**
2. Type a password of at least 14 characters into the **Password field** and type it again in the **Confirm Password field**

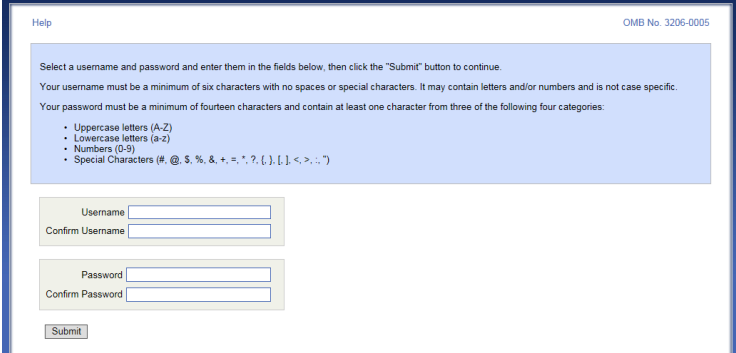
**Note:** Your password must contain one character from three of the following categories:

Uppercase letters (A-Z) Lowercase letters (a-z)

Numbers (0-9)

Special Characters (#, @, \$, %, &, +, =, \* ? {, }, [, ], <, >, :, ;, “)

3. Select **Submit**

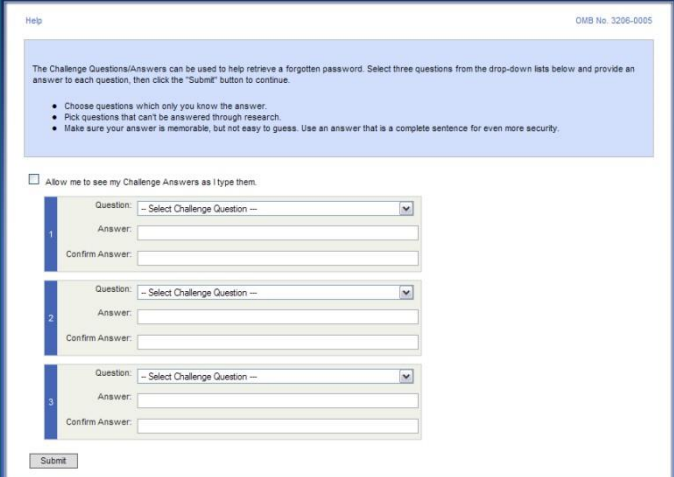


The screenshot shows a web form titled "Help" with the OMB No. 3206-0005. It contains instructions for creating a username and password. The instructions state that the username must be at least six characters long, with no spaces or special characters, and is not case-specific. The password must be at least fourteen characters long and contain at least one character from three of four categories: uppercase letters (A-Z), lowercase letters (a-z), numbers (0-9), and special characters. The form includes fields for "Username", "Confirm Username", "Password", and "Confirm Password", along with a "Submit" button.

### 4.2.4 Create a Set of Challenge Questions

The last step in setting up your e-QIP account is to create a set of Challenge Questions. In the event you forget your password, you'll be prompted to answer the Challenge Questions before being allowed to reset it yourself. In the event you forget both your username and password, contact your sponsoring agency to have your account reset. You will have to reregister as a new user.

1. For each of the three question fields:
    - a. Select a question from the **Question** drop-down list box
    - b. Type the answer into both the **Answer** and **Confirm Answer** fields
  2. If you wish, select the checkbox above the questions labeled **Allow me to see my Challenge Answers as I type them** to see the responses as you type
- Note:** Do not allow anyone to see your computer screen while your answers are on the screen.
3. Select **Submit**



The screenshot shows a web form titled "Help" with the OMB No. 3206-0005. It contains instructions for creating challenge questions. The instructions state that the user should select three questions from a drop-down list and provide an answer to each. The user should choose questions that only they know the answer to, pick questions that can't be answered through research, and make sure their answer is memorable but not easy to guess. The form includes a checkbox labeled "Allow me to see my Challenge Answers as I type them" and three sets of question, answer, and confirm answer fields, along with a "Submit" button.

**Remember!** It may be several years before you return to the e-QIP system to complete a reinvestigation, so it is recommended that you use questions and answers that you will remember in the distant future.

It is your responsibility to remember your Challenge Answers. It is also important to protect the answers to your Challenge Questions. These answers enable you to reset your password without agency assistance.

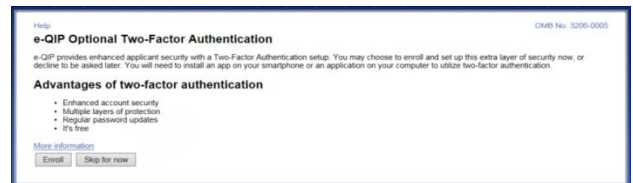
## 4.2.5 Two-Factor Authentication Option

### Enhanced Security Factor:

e-QIP now has enhanced applicant security with a Two-factor Authentication setup. This will link your e-QIP account to a personal device of your choice such as a smartphone or computer so that you must be in possession of that personal device at the time of all future logins. **This is only an option and not a requirement.** If you do not have access to the device at the time of logging in you will have to contact your sponsoring agency to have your account reset.

If you wish to enroll in Two-Factor Authentication, click **Enroll** and see [Appendix D](#) for directions.

If you wish to do this as a later time or opt out of Two-Factor Authentication, click **Skip for now**, and proceed to section 5 of this guide.



## 5 Entering Your Information

After you have successfully logged into e-QIP, you will be able to begin entering your data. First, you will see the “Complete an Investigation Request” screen.

### 5.1 Reviewing the Form

1. Verify your personal data displayed at the top of the Complete an Investigation Request screen.
2. When you are ready to begin completing the form, select the link that says **Enter Your Data**.

**Note:** If you have been sponsored by multiple agencies within e-QIP at the same time, you may have multiple e-QIP request numbers here. Make sure that you select the correct link for the request you want to complete.



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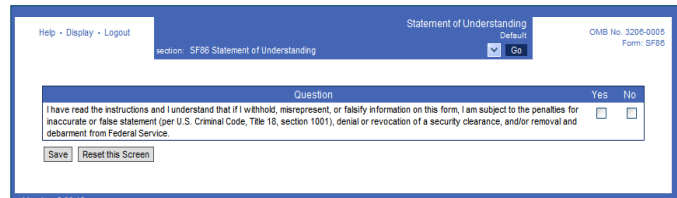
## 5.2 Reviewing the Form Completion Instructions

Prior to entering data for the first time, you *must* read the instructions on the “Instructions for Editing Your Form Data” screen. You will also be shown a disclaimer screen that provides additional instructions required by Executive Order 12968. You *must* indicate that you have read and understand the additional instructions by selecting the corresponding button in order to proceed.

Confirm that you have read and understand the form completion instructions by confirming the “SF 86 Statement of Understanding.”

1. Select the **Yes** checkbox
2. Select **Save**

You are now ready to complete your SF 86 (or other SF form).



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## 5.3 Tips for Completing the SF 86

- Read the entire form thoroughly and answer the questions truthfully.
- The form was designed to enable you to answer the minimum number of questions necessary for your specific situation. Your responses to a series of **Yes/No** questions will dictate whether you receive additional questions in a given area or advance to the next section.
- Use the **[Tab]** key to navigate through fields and complete the questions.
- **Do not use** the browser’s **Forward** or **Back** buttons or the system will log you out as a security precaution.
- Select the **Reset this Screen** button at any time prior to selecting the **Save** button if you make a mistake and want to start over on a screen. This clears all of the information you entered on that page.
- Select **Save** or **Save/Continue** at the bottom of each page to move forward when you are finished and ready to proceed. Your information will be submitted and the next screen will appear. Continue until all information screens have been completed.
- You may also use the **Navigation** drop-down menu located at the top of the screen to go to any section of the form in any order. Select the section from the drop-down menu and select **Go**. Then navigate to the specific subsection desired.
- Select the “**Add Optional Comment**” button when it appears to provide additional comments if desired.
- You can review a copy of the form at any time by selecting the **Display** link in the upper left corner.

## 5.4 Avoiding Common Data Entry Errors

The latest electronic version of the SF 86 is designed to be intuitive and clear. Nevertheless, you may find the suggestions below helpful as you complete the form. These suggestions are based on some of the most frequently asked applicant questions. This guide does not cover every question within the SF 86, but highlights some of the commonly questioned items. They are organized by the corresponding section of the SF 86.

### 5.4.1 Section 4 – Social Security Number

The SSN that you provide in Section four of the form must match the SSN that was used to initiate your request. If they do not match, you must contact your agency representative with the correct SSN. You will not be allowed to continue past Section 4 until the SSNs match.

If you were initiated without an SSN, select the **Not Applicable** checkbox.

The screenshot shows the 'Sections 1-4 - Identifying Information' form. At the top, there is a navigation bar with 'Help - Display - Logout' and 'section: SF86 Sections 1-4 - Identifying Information'. Below this, a heading reads: 'Provide your full name. If you have only initials in your name, provide them and indicate 'initial only'. If you do not have a middle name, indicate 'No Middle Name'. If you are a 'Jr.', 'Sr.', etc. enter this under Suffix.'

The form contains several input fields:

- Name:** Fields for Last, First, Middle, and Suffix. A dropdown menu for 'Middle' is set to 'No Middle Name'.
- Provide your date of birth:** Fields for Month, Day, and Year, along with an 'Est.' checkbox.
- Provide your place of birth:** Fields for City, State, and Country.
- Provide your U.S. Social Security Number:** A checkbox for 'Not Applicable' and three input fields for the SSN digits.

At the bottom, there are buttons for 'Add Optional Comment', 'Save', and 'Reset this Screen'.

## 5.4.2 Section 8 – U.S. Passport Information

Indicate whether or not you possess a U.S. Passport.

This screenshot shows the top portion of the SF86 Section 8 - U.S. Passport Information form. At the top, there is a navigation bar with 'Help', 'Display', and 'Logout' options. The section title 'Section 8 - U.S. Passport Information' is displayed, along with 'Default' and 'Go' buttons. A link for screen navigation is provided. The main question is 'Do you possess a U.S. passport (current or expired)?' with 'Yes' and 'No' radio buttons. Below the question is a link to the U.S. State Department passport help page. At the bottom, there is an 'Add Optional Comment' field and 'Save' and 'Reset this Screen' buttons.

If you select **Yes**, you will be asked to enter additional information about your U.S. passport.

A link to the U.S. State Department website is provided in the event that you need assistance in completing this section.

This screenshot shows the middle portion of the SF86 Section 8 - U.S. Passport Information form. It prompts the user to 'Provide the following information for the most recent U.S. passport you currently possess.' The fields include: 'Provide your U.S. passport number:' with a text input field; a link to the U.S. State Department passport help page; 'Provide the issue date of passport' with a 'Month/Day/Year' dropdown and an 'Est.' checkbox; 'Provide the expiration date of passport' with a 'Month/Day/Year' dropdown and an 'Est.' checkbox; and 'Provide the name in which passport was first issued' with a table for Name (Last, First, Middle, Suffix) and a dropdown for IONFNMMN. At the bottom, there is an 'Add Optional Comment' field and 'Save' and 'Reset this Screen' buttons.

## 5.4.3 Section 9 – Citizenship

Indicate your citizenship status.

This screenshot shows the SF86 Section 9 - Citizenship form. It prompts the user to 'Select the box that reflects your current citizenship status and click Save.' Below this, there is a section titled 'Provide your current citizenship status:' with four radio button options: 'I am a U.S. citizen or national by birth in the U.S. or U.S. territory/commonwealth.', 'I am a U.S. citizen or national by birth, born to U.S. parent(s), in a foreign country.', 'I am a naturalized U.S. citizen.', and 'I am not a U.S. citizen.' At the bottom, there is an 'Add Optional Comment' field and 'Save' and 'Reset this Screen' buttons.

## 5.4.4 Section 11 – Where You Have Lived

List places you have lived beginning with your present residence and working backward 10 years. There can be no date gaps. Do not list residences before your 18th birthday unless to provide a minimum of 2 years residence history.

The city, state, and zip code are required for all addresses.

All contact information must include a physical address. PO Boxes are unacceptable. APO/FPO is allowed.

If you provide an APO/FPO address, you will be asked to provide physical location with street address, base, post, embassy, unit, and country location or home port/fleet headquarter.

The screenshot shows the SF86 Section 11 - Where You Have Lived form. The form is titled "Section 11 - Where You Have Lived" and includes a "Detail" link and "CHS No. 3250-0206 Form SF86" information. A navigation link says "Click here for available screen navigation in Section 11 - Where You Have Lived". The form is divided into several sections: "Enter residence information.", "Provide dates of residence" (with fields for Date, Month/Year, and Est./Pres. for From and To), "Is/was this residence:" (with checkboxes for Owned by you, Rented or leased by you, Military housing, and Other (Provide explanation)), "Explanation" (a text area), and "Provide the street address" (with fields for Street, City, State, Zip Code, and Country). There are also "Add Optional Comment", "Save", and "Reset this Screen" buttons.

For locations outside of the U.S. and its territories, select the country in the “Country” dropdown list and leave the “State” field blank. It is not necessary to enter the United States as the country when the State location is inside the United States.

Below are some additional resources that you may find helpful in locating required address information:

Address information – <http://maps.google.com>

Zip code lookup – <http://zip4.usps.com/zip4/welcome.jsp>

Area code lookup – [http://www.nanpa.com/area\\_code\\_maps/ac\\_map\\_static.html](http://www.nanpa.com/area_code_maps/ac_map_static.html)



### 5.4.5 Section 12 – Where You Went to School

You must go back 10 years. If you did not receive a degree or diploma within this time period, you will be asked to list the last school you attended.

The screenshot shows the SF86 Section 12 - Where You Went To School form. At the top, there is a navigation bar with 'Help -> Display - Logout' on the left, 'Section 12 - Where You Went To School' in the center, and 'Default' and 'Go' on the right. Below this is a dropdown menu for 'Section 12 - Where You Went To School' and a 'Go' button. A blue link says 'Click here for available screen navigation in Section 12 - Where You Went To School'. A light blue box contains the instruction: 'Do not list education before your 18th birthday, unless to provide a minimum of two years education history.' Below this is a table with a 'Question' column and 'Yes' and 'No' columns. The question is 'Have you attended any schools in the last 10 years?' with empty checkboxes. Below the table is an 'Add Optional Comment' button, and at the bottom are 'Save' and 'Reset this Screen' buttons.

### 5.4.6 Section 13a – Employment Activities – Employment & Unemployment Record

Enter information for all of your employment activities, including unemployment and self-employment beginning with the present and working back 10 years. There must be no date gaps.

Provide a verifier for any period of self-employment or unemployment. Also, explain any commuting distance discrepancies between conflicting employment locations and residences in the additional comments.

The screenshot shows the SF86 Section 13a - Employment Activities form. At the top, there is a navigation bar with 'Help -> Display - Logout' on the left, 'Section 13a - Employment Activities' in the center, and 'Employment and Unemployment Record Detail' and 'Go' on the right. Below this is a dropdown menu for 'Section 13a - Employment Activities' and a 'Go' button. A blue link says 'Click here for available screen navigation in Section 13a - Employment Activities'. The main section is titled 'Select your employment activity' and features a dropdown menu with a list of options: 'Active military duty station', 'National Guard/Reserve', 'USPHS Commissioned Corps', 'Other Federal employment', 'State Government (Non-Federal employment)', 'Self-employment', 'Unemployment', 'Federal Contractor', 'Non-government employment (excluding self-employment)', and 'Other (Provide explanation)'. Below this is a section titled 'Provide dates of employment' with a table with columns 'Date', 'Month/Year', and 'Est./Pres.'. The 'From:' and 'To:' rows have dropdown menus for month and year. Below the table is an 'Add Optional Comment' button, and at the bottom are 'Save' and 'Reset this Screen' buttons.

All contact information must include a physical address. PO Boxes are unacceptable. APO/FPO is allowed. For address information refer to: <http://maps.google.com>.

If you worked for the same employer on more than one occasion at the same physical address, enter the most recent period of employment first, and then use the Add Additional Period of Activity section to add the details for the other employment period(s).

The screenshot shows the 'SF86 Section 13A - Employment Activities' form. It includes fields for 'Employment activity: Non-government employment (excluding self-employment)', 'Dates of employment: From 06/1990 To 05/2000', and 'Provide most recent position title:'. There are checkboxes for 'Full-time' and 'Part-time' employment status. The 'Provide the name of your employer:' field is followed by a section for 'Provide the address of employer' with sub-fields for Street, City, State, Zip Code, and Country. Below that is a section for 'Provide telephone number' with fields for Number, Extension, and Time, and a checkbox for 'Check box if International or DSN phone number'. The bottom section is 'Additional Periods of Activity with this Employer', which includes a table for recording previous periods of employment.

#	Dates of employment			Position title	Supervisor
	Date	Month/Year	Est.		
1.	From: [dropdown] / [dropdown] / [dropdown]	[dropdown] / [dropdown] / [dropdown]	[dropdown]	[text box]	[text box]

### 5.4.7 Section 14 - Selective Service Record

Males born after December 31, 1959, must list their Selective Service Number.

If you do not know your Selective Service Number, call 1-847-688- 6888 or visit <http://www.sss.gov> to obtain it.

The screenshot shows the 'SF86 Section 14 - Selective Service Record' form. It features a table with columns for 'Question', 'Yes', and 'No'. The question listed is 'Were you born a male after December 31, 1959?'. Below the table is an 'Add Optional Comment' field and 'Save' and 'Reset this Screen' buttons.

Question	Yes	No
Were you born a male after December 31, 1959?	<input type="checkbox"/>	<input type="checkbox"/>

## 5.4.8 Section 16 – People Who Know You Well

Provide three people who know you well and who preferably live in the U.S.

People you include should be friends, peers, colleagues, college roommates, associates, etc., who are collectively aware of your activities outside of your workplace, school, or neighborhood, and whose combined association with you covers at least the last 10 years.

Do not list your spouse, former spouse(s), other relatives, or anyone listed elsewhere on this form in this section.

The screenshot shows the SF 86 Section 16 form titled "Section 16 - People Who Know You Well". The form includes the following sections:

- Provide dates known:** A table with columns "Date", "Month/Year", and "Est./Pres." containing "From:" and "To:" rows with dropdown menus for month and year.
- Provide full name:** A table with columns "Name" and "JOINFNMIN" containing fields for "Last:", "First:", "Middle:", and "Suffix:".
- Provide rank/title:** A checkbox labeled "Not Applicable" with an adjacent text input field.
- Provide relationship to you (Check all that apply):** A list of checkboxes for "Neighbor", "Friend", "Work associate", "Schoolmate", and "Other (Provide explanation)".
- Explanation:** A large text area for providing details.
- Provide telephone number for this person:** A checkbox "I don't know" and a table with columns "Number", "Extension", and "Time" for entering contact information.
- Provide mobile/cell telephone number for this person:** A checkbox "I don't know" and a table with columns "Number", "Extension", and "Time" for entering contact information.
- Provide e-mail address for this person:** A checkbox "I don't know" and an adjacent text input field.
- Provide home or work address for this person:** Fields for "Street:", "City:", "State:", "Country:", and "Zip Code:".

At the bottom of the form, there are buttons for "Add Optional Comment", "Save", and "Reset this Screen".

## 5.4.9 Section 17 – Marital Status

1. You must select an option as to your current marital status.

If you are separated from your spouse, provide a separation date and your spouse's current or last known residence.

You will be prompted to complete additional information based upon your situation.

2. If you choose the status “Never Married,” the Cohabitant question will appear.

A cohabitant is a person with whom you share bonds of affection, obligation, or other commitment, as opposed to a person with whom you live with for reasons of convenience (e.g. a roommate). If applicable, complete the information requested about your cohabitant. If your cohabitant was born outside of the U.S., provide citizenship information.

3. The **Place of Birth** field for the spouse, former spouse, and cohabitant will require a country of birth even if a state has already been provided.

This screenshot shows the top portion of the SF86 Section 17 - Marital Status form. The title bar indicates 'Section 17 - Marital Status' and 'Default'. A dropdown menu is open, showing the following options: 'Never Married', 'Married (including Common Law)', 'Separated', 'Annulled', 'Divorced', and 'Widowed'. The 'Never Married' option is currently selected.

This screenshot shows the 'Cohabitant' section of the SF86 Section 17 - Marital Status form. It includes a navigation link: 'Click here for available screen navigation in Section 17 - Marital Status'. Below this is a text box defining a cohabitant: 'A cohabitant is a person with whom you share bonds of affection, obligation, or other commitment, as opposed to a person with whom you live with for reasons of convenience (e.g. a roommate). If applicable, complete the following about your cohabitant. If your cohabitant was born outside the U.S., provide citizenship information.' A table with two columns, 'Question' and 'Yes No', contains the question 'Do you presently reside with a cohabitant?' with empty checkboxes. Below the table are buttons for 'Add Optional Comment', 'Save', and 'Reset this Screen'.

This screenshot shows the 'Current Spouse' section of the SF86 Section 17 - Marital Status form. It includes a navigation link: 'Click here for available screen navigation in Section 17 - Marital Status'. A message states: 'You selected "Married" or "Separated." Complete the following about your current spouse only.' The 'Provide spouse's full name' section contains fields for Last, First, Middle, and Suffix, with dropdown menus for First, Middle, and Suffix. The 'Provide spouse's date of birth' section contains a 'Month/Day/Year' field with dropdown menus for month and day, and a 'Est.' checkbox. The 'Provide spouse's place of birth' section contains fields for City, State, County, and Country, with dropdown menus for State and Country. Below these fields are buttons for 'Add Optional Comment', 'Save', and 'Reset this Screen'.

## 5.4.10 Section 18 - Relatives

1. Select each type of relative applicable to you, regardless if they are living or deceased.

An opportunity will be provided to list multiple relatives for each type, if necessary.

This screenshot shows the 'Section 18 - Relatives' selection screen. At the top, there is a navigation bar with 'Help - Display - Logout' on the left, 'Section 18 - Relatives Default' in the center, and 'OMB No. 3206-0006 Form: SF86' on the right. Below the navigation bar, a dropdown menu shows 'SF86 Section 18 - Relatives' and a 'Go' button. A blue instruction box states: 'Select each type of relative applicable to you, regardless if they are living or deceased. (An opportunity will be provided to list multiple relatives for each type.)'. The main area contains a list of relative types with checkboxes: Mother, Father, Stepmother, Stepfather, Foster Parent, Child (including adopted/foster), Stepchild, Brother, Sister, Stepbrother, Stepsister, Half-brother, Half-sister, Father-in-law, Mother-in-law, and Guardian. At the bottom, there are buttons for 'Add Optional Comment', 'Save', and 'Reset this Screen'.

2. Enter the details for each relative.

Provide address information, place of birth including state and country of birth, citizenship, contact information, employer information, and any contact with foreign government or military personnel.

The **Place of Birth** field will require a country of birth even if a state has already been provided.

This screenshot shows the 'Section 18 - Relatives Details' screen. At the top, there is a navigation bar with 'Help - Display - Logout' on the left, 'Section 18 - Relatives Details' in the center, and 'OMB No. 3206-0006 Form: SF86' on the right. Below the navigation bar, a dropdown menu shows 'SF86 Section 18 - Relatives' and a 'Go' button. A blue instruction box states: 'Click here for available screen navigation in Section 18 - Relatives'. The main area contains several form fields: 'Provide relative type' (dropdown), 'Provide your relative's full name' (Last, First, Middle, Suffix), 'Provide your relative's date of birth' (Month/Day/Year, Est), 'Provide your relative's place of birth' (City, State, Country), and 'Provide your relative's country(ies) of citizenship' (Country, Add a Country). At the bottom, there are buttons for 'Add Optional Comment', 'Save', and 'Reset this Screen'.

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### 5.4.11 Section 19 – Foreign Contacts

A foreign national is defined as any person who is not a citizen or national of the U.S.

You must indicate whether you have, or have had, close and/or continuing contact with a foreign national within the last seven years with whom you, or your spouse, or cohabitant are bound by affection, influence, common interests, and/or obligation.

If you have, you will be prompted to provide additional information.

Include associates as well as relatives not previously listed in Section 18 (Relatives).

---

The screenshot shows the SF 86 Section 19 - Foreign Contacts form. At the top, there is a navigation bar with "Help", "Display", and "Logout" on the left, and "Section 19 - Foreign Contacts" and "Default" in the center. A dropdown menu is set to "SF 86 Section 19 - Foreign Contacts" with a "Go" button. On the right, it says "OMB No: 3206-0005" and "Form: SF 86". Below this is a definition: "A foreign national is defined as any person who is not a citizen or national of the U.S." The main question is: "Do you have, or have you had, close and/or continuing contact with a foreign national within the last seven (7) years with whom you, or your spouse, or cohabitant are bound by affection, influence, common interests, and/or obligation? include associates as well as relatives, not previously listed in Section 18." There are "Yes" and "No" checkboxes. Below the question is an "Add Optional Comment" field and "Save" and "Reset this Screen" buttons.

### 5.4.12 Section 20a – Foreign Activities

You must indicate whether you, your spouse, your cohabitant, or any of your dependent children have EVER had any foreign financial interests such as stocks, property, bank accounts, businesses or investments.

Exclude financial interests in companies or diversified mutual funds that are publicly traded on a U.S. exchange.

If you answer “**Yes**,” you will be prompted to provide additional information.

The screenshot shows the SF 86 Section 20A - Foreign Activities form. At the top, there is a navigation bar with "Help", "Display", and "Logout" on the left, and "Section 20A - Foreign Activities" and "Default" in the center. A dropdown menu is set to "SF 86 Section 20A - Foreign Activities" with a "Go" button. On the right, it says "OMB No: 3206-0005" and "Form: SF 86". Below this is the question: "Have you, your spouse, cohabitant, or dependent children EVER had any foreign financial interests (such as stocks, property, investments, bank accounts, ownership of corporate entities, corporate interests or businesses) in which you or they have direct control or direct ownership? (Exclude financial interests in companies or diversified mutual funds that are publicly traded on a U.S. exchange.)" There are "Yes" and "No" checkboxes. Below the question is an "Add Optional Comment" field and "Save" and "Reset this Screen" buttons.

---

### 5.4.13 Section 20b – Foreign Business, Professional Activities, and Contacts

Indicate whether you have provided any support or advice to an individual associated with a foreign business or organization (not listed as a previous employer) within the last seven years.

If you answer “**Yes**,” you will be prompted to provide additional information.

The screenshot shows the SF 86 Section 20b form titled "Section 20b - Foreign Business, Professional Activities, and Foreign Government Contacts". The question asks: "Have you in the past seven (7) years provided advice or support to any individual associated with a foreign business or other foreign organization that you have not previously listed as a former employer? (Answer 'No' if all your advice or support was authorized pursuant to official U.S. Government business.)". There are "Yes" and "No" checkboxes. Below the question is an "Add Optional Comment" field and "Save" and "Reset this Screen" buttons.

---

### 5.4.14 Section 21 – Psychological and Emotional Health

Indicate whether or not you have consulted with a mental health professional in the last 7 years, per the instructions provided on the screen.

If you answer **Yes**, you will be prompted to provide the name, address, and phone of the doctor and facility with dates seen.

The screenshot shows the SF 86 Section 21 form titled "Section 21 - Psychological and Emotional Health". A note states: "Mental health counseling in and of itself is not a reason to revoke or deny eligibility for access to classified information or for a sensitive position, suitability or fitness to obtain or retain Federal employment, fitness to obtain or retain contract employment, or eligibility for physical or logical access to federally controlled facilities or information systems." The question asks: "In the last seven (7) years, have you consulted with a health care professional regarding an emotional or mental health condition or were you hospitalized for such a condition? Answer 'No' if the counseling was for any of the following reasons and was not court-ordered." Below the question are two bullet points: "strictly marital, family, grief not related to violence by you; or" and "strictly related to adjustments from service in a military combat environment." There are "Yes" and "No" checkboxes. Below the question is an "Add Optional Comment" field and "Save" and "Reset this Screen" buttons.

If you answered **Yes** to Question 21, you must submit an “Authorization for Release of Medical Information” Signature Form with your request that will be generated after form certification.

**Note:** Mental health treatment and counseling, in and of itself, is not a reason to revoke or deny eligibility for access to classified information or for holding a sensitive position, suitability or fitness to obtain or retain Federal or contract employment, or eligibility for physical or logical access to federally controlled facilities or information systems. Seeking or receiving mental health care for personal wellness and recovery may contribute favorably to decisions about your eligibility.

---

### 5.4.15 Section 26 – Financial Record

Indicate whether or not you have filed a petition under any chapter of the bankruptcy code within the last seven years.

You must also indicate whether you have encountered any other financial issues within the past seven years and will be specifically prompted by additional questions.

Help · Display · Logout      Section 26 - Financial Record Bankruptcy      OMB No. 3208-0005 Form: SF86

section: SF86 Section 26 - Financial Record      Go

[Click here for available screen navigation in Section 26 - Financial Record](#)

Question	Yes	No
In the last seven (7) years have you filed a petition under any chapter of the bankruptcy code?	<input type="checkbox"/>	<input type="checkbox"/>

[Add Optional Comment](#)

You will be prompted to complete additional required sections based upon your responses.

When prompted, provide information for the timeframe mentioned in each specific question.

When listing past due debts, include reasons for the status, amounts owed, and whether or not you have satisfied the issue. If you are working on the issue with a creditor, please explain when the debt will be paid.

---

### 5.4.17 – Provide Email Address

Right before validation of the form begins you will be given the chance to provide your email address.

Enter your email address, then click **Save**.

Help · Display · Logout      Supplemental Information Provide Optional Information      OMB No. 3208-0005

section: Supplemental Information      Go

If you choose, you may also provide any or all of the following additional information items to us. When finished, click "Save" to continue.

**Internet Email Address**

FORM 3208 (04/11)



## 6 Validating: Handling Error Messages and Warnings

In order to ensure the completeness of your data, a validation occurs each time you click **Save** or **Save/Continue**. The validation will point out any Errors or Warnings and provide detailed instructions on how to satisfy each missing item. You will only receive validation messages if you have not answered a question appropriately.

For Example:

The below Validation Summary shows in the header that the Errors are present in Section 13A – Employment activities. You would use the drop-down menu at the top of the screen to navigate to Section 13A, then click **Go**.

The validation warnings or errors will also display in the section which needs updated.

Help · Display · Logout

Validate, Review, and Certify  
Validate Your Data

OMB No. 3206-0005

section: SF86 Section 13A - Employment Activities

Below are the results of validating your data.

Validation found errors or unsatisfied warnings in the information you provided. If available, click on the direct link provided for each violation below, or use the dropdown menu above to return to the appropriate section to make corrections.

Validation Summary	
Type	Message
Section 13A - Employment Activities ⇒	
Error	Answer "For this employment, in the last seven (7) years have you received a written warning, been officially reprimanded, suspended, or disciplined for misconduct in the workplace, such as a violation of security policy?" question yes or no. ⇒
Error	Provide a response for "Employment status for this position". ⇒
Error	Answer "Is your physical work address different than your employment address?" question yes or no. ⇒
Error	Provide a response for "Name of your employer". ⇒
Error	Answer "Is/was your physical work address different than your employer's address?" question yes or no. ⇒
Error	Answer "Do you have an additional employment activity to enter?" question yes or no. ⇒

1. After navigating to the section that requires updating, you may need to go further into a specific employment, residence, or reference entry.

For validation “**Warning**” messages, you must provide the requested information before final validation occurs.

In some cases you may check the box “**I do not know this information**,” if applicable. If you do select this check box, you must provide an additional explanation.

The screenshot shows the 'Validation Results' section of the SF86P form. The page title is 'Section 13: People Who Know You Well'. The breadcrumb trail is 'Help - Display - Logout' and 'section: SF86P Section 13: People Who Know You Well'. The OMB No. 3206-0005 and Form SF86P are also visible. The main content area is a table with two columns: 'Type' and 'Message'. The 'Type' column contains 'Warning'. The 'Message' column contains the text: 'Provide a third person who knows you well. I do not know the requested information. (Note: If you check the box above, then you must also explain below.) Explain: There are only 2 people that live in my town with me.' At the bottom of the message box, there is a note: 'Note: This message indicates problems with the information submitted. Messages labeled "Error" must be corrected. Messages labeled "Warning" must be corrected or explained. Make the changes indicated and click "Save" to revalidate. Click "Save/Continue" if you want to make these changes later.'

2. After choosing an action, select the **Save** button to save your changes.
3. Once you have satisfied your validation errors or warnings use the drop-down menu and choose the Validate, Review and Certify section, then click **Go**.
4. When the validation results show no more Errors or Warnings, select **Continue**.

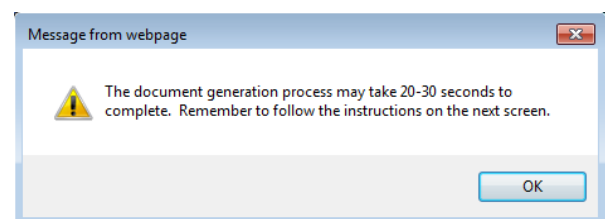
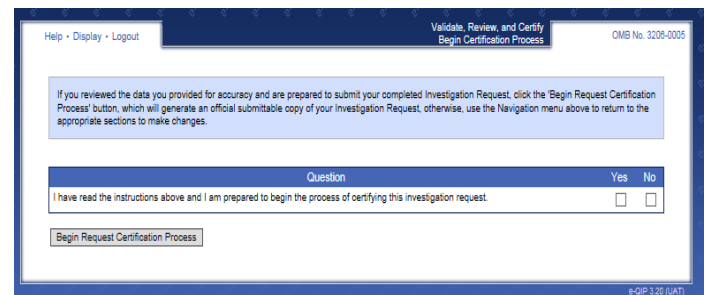
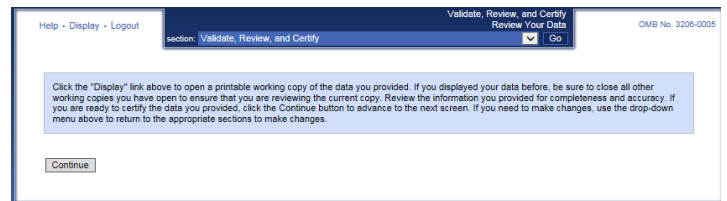
The screenshot shows the 'Validate, Review, and Certify' section of the SF86P form. The page title is 'Validate, Review, and Certify'. The breadcrumb trail is 'Help - Display - Logout' and 'section: Validate, Review, and Certify'. The OMB No. 3206-0005 is also visible. The main content area contains the text: 'Below are the results of validating your data. Validation found no errors or unsatisfied warnings. You may continue to the next task.' At the bottom of the content area, there is a 'Continue' button.

## 7 Reviewing the SF 86

When you are satisfied that your form is complete and no validation errors are present, you have the option of reviewing a display copy of your form before certifying it. You can also review the Display copy at any time as you complete the form. Certifying your form is the act of signing (electronically or manually) your form and certifying that all your answers are true and complete to the best of your knowledge.

### To review the form before certifying:

1. Select **Display** in the upper left corner of the next screen to view the document. An .html document will open in a separate browser window or a new tab within the browser window. When you have finished reviewing the form, close the window.
2. You may navigate back to previous sections of the form using the drop-down menu at the top center of the page at this time if you need to make any changes.
3. If you do not have any changes, select **Continue**.
4. If you are ready to continue, you can select **Yes**, and then select **Begin Request Certification Process** button to complete your form.  
**Important!** You will have one more opportunity to go back and make corrections after this point, but once you certify the form, further down, your answers will be locked and the form will become unavailable for editing. You will be unable to make any further changes.
5. A pop-up dialog box displays informing you that the process will take 20-30 seconds.
6. Select **OK**.



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## 8 Completing the Certification and Signature Release Forms

The final release of your request is completed in several steps.

- Print or save an Archival Copy of the entire form
  - Sign your signature forms electronically or opt to print the signature forms and sign with pen and ink.
  - Add any printed and signed hardcopy signature forms as attachments using the upload feature, fax solution feature or sending to your sponsoring agency outside of e-QIP. Follow your sponsoring agencies directions for handling of forms if they have any.
  - Release and transmit the investigation request to the requesting agency
- 

### 8.1 Signing Your Signature Pages

Signature Forms are a required part of an investigation as they authorize your Investigation Service Provider (ISP) to obtain necessary information. You must utilize the Click-to-Sign function, or a pen and ink signature for your signature forms. If a pen and ink signature is used, you must send them to your sponsoring agency by fax, mail or uploading via e-QIP. Digitally signed Signature Pages are automatically attached to the investigation request so you do not need to print and send them to your agency or upload them when utilizing Click-to-Sign. You should follow instructions provided to you by your sponsoring agency as to which option to choose to transmit these signature forms to them.

1. If your Agency is utilizing Click-to-Sign this screen will automatically appear after hitting the “Begin Request Certification Process”.

Question	Yes	No
Do you agree to utilize the click-to-sign functionality on all relevant forms?	<input type="checkbox"/>	<input checked="" type="checkbox"/>

To utilize Click-to-Sign check **Yes**, and click **Continue**.

If you select **No** or do not get the option to use click-to-sign, refer to [Appendix A](#).

2. If you select **Yes**, you will receive a screen with the field **Enter Password**. This password will be the same one you used to log into your e-QIP account.

Enter your password, then click the "Continue" button.

Enter Password:

Enter your password and click **Continue**.

- Your first signature form (Certification) will appear.

You can **Edit Your Data**, from the upper left corner of the form, which will allow you to go back into your e-QIP to make corrections, validate again, and begin the certification process again, OR, you can select **Click Here To Sign**.

Note: Once you **Click Here to Sign**, you will no longer be able to go back and make corrections.

- You are next given the option to download a receipt of your certification. Click the **Download a Receipt** link in order to generate a .pdf of your certification.

Click **Continue**

- This will bring you to your next Signature Page (Release), where you will need to enter your password in the **Enter Password** field again. Click **Continue**

You can now continue with the steps above, to sign all releases the same way.

- When the last release has been signed, you will see the following screen:**

## 8.2 Instruction for Signature Pages, Attachments, and Archival Copy

Review the instructions for attaching files and printing a copy for your records.

Select **Next**



### 8.2.1 Print or Save an Archival Copy of Your SF 86

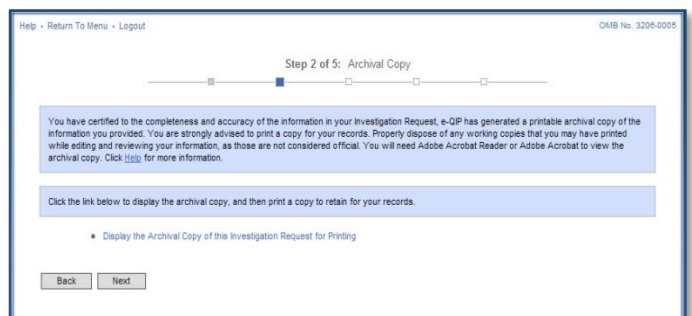
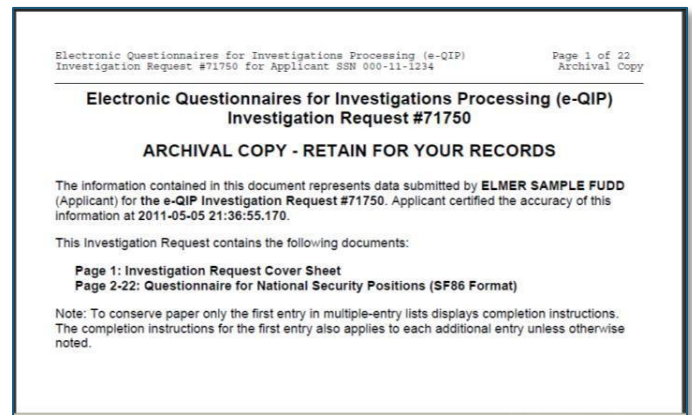
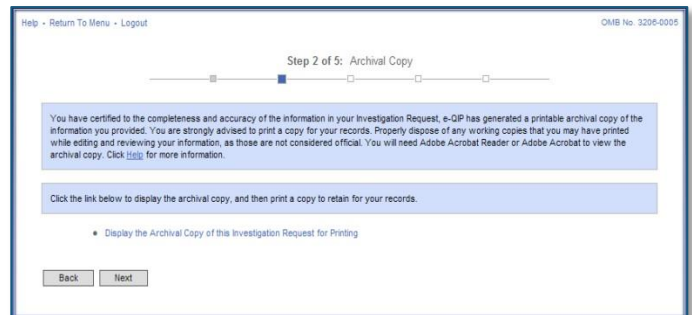
Print and/or save an electronic copy of the information you provided on the SF 86 for your records. If you do not have printer access, logout of e-QIP and go to a computer with printer access. Then log back into e-QIP to print the forms.

1. To print, select the line **Display the Archival Copy of this Investigative Request for Printing**. The archival copy will open in Adobe Reader.

**Note:** The archival copy and signature pages display as PDF files. You must have the free Adobe Reader to view them. You can download Adobe Reader from

<http://www.adobe.com/products/acrobat/readstep2.html>

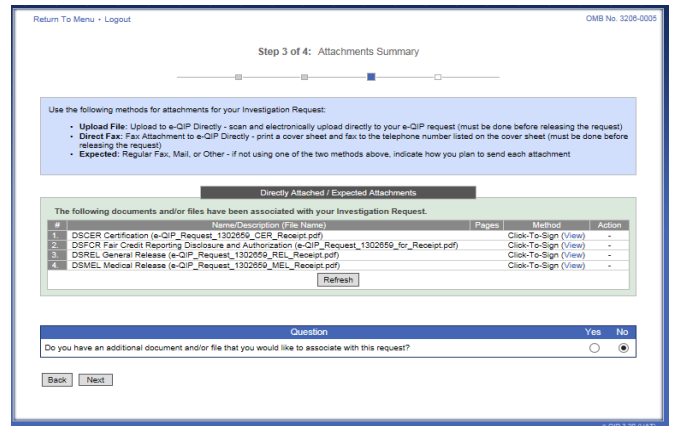
2. You must print and/or save the Archival Copy at this point, as you will not be able to access it at a later time once you release the form. In the Adobe Reader software, select the **print icon** or save the pdf to your preferred location.
3. Close the Acrobat Reader window by selecting the **X** button in the upper right corner.
4. You will still be at the archival copy screen. Click **Next**.



You will now see all currently attached documents. If you utilized Click-to Sign you will see each signature page that you had signed with Click-to-Sign and can **View** each. (You can print a copy or save your releases).

If you have any additional documents that you would like to associate with this request, select **Yes**, click **Next** and go to [Appendix B](#) for upload instructions.

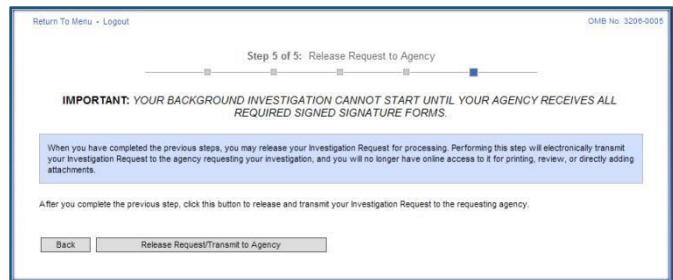
Otherwise select **No**, and click **Next**.



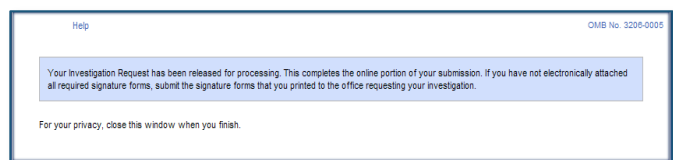
## 9 FINAL STEP: Release and Transmit the SF 86 Form

**Important!** You will not be able to access your investigation forms after you click “Release Request/Transmit to Agency.” Be sure you have printed and/or attached all required forms before clicking “Release Request/Transmit to Agency”

1. Select **Release Request/Transmit to Agency**



2. If the confirmation screen appears, you are logged out of e-QIP and your information has been transmitted to your sponsoring agency.



**Congratulations!** You have completed and submitted your investigation request.

If you have any questions about your investigation status, please follow up directly with your contact at your sponsoring agency.

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## 10 What happens next?

Your sponsoring agency will carefully review your submitted SF 86. In the event that your information or attachments are incomplete, the sponsoring agency may return the information you provided in e-QIP and contact you to make corrections to the form.

In the event you are contacted to make corrections to your form, you will need to:

- Log into e-QIP
- Review the details of the request and make corrections via the e-QIP system
- Answer all Yes/No questions again
- Re-certify and print a new archival copy of the form
- Print, sign and attach new signature pages
- Re-release your form to the agency

Once the investigation has been scheduled, you may be contacted by an investigator to schedule your personal interview, if required. For the interview, you will be required to provide photo identification, such as a valid state driver's license. You may be required to provide other documents to verify your identity, as instructed by your investigator.



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## APPENDIX A: Signature Process for Pen and Ink Signatures

1. Select the **Signature Forms** link displayed under Step Two Signature Forms for Printing.
2. This will open the signature pages in a separate window.
3. If you do not have printer access, logout of e-QIP and go to a computer with printer access. Then log back into e-QIP to print the forms.

The screenshot shows a web interface for the signature process. At the top, there are links for 'Help', 'Return To Menu', and 'Logout', and a reference number 'OMB No. 3208-0055'. A progress bar indicates 'Step 3 of 5: Signature Forms'. A prominent warning states: 'IMPORTANT: YOUR BACKGROUND INVESTIGATION CANNOT START UNTIL YOUR AGENCY RECEIVES ALL REQUIRED SIGNED SIGNATURE FORMS.' Below this, two instructional boxes provide details: the first explains that the agency must receive signed forms to begin processing and that the printed copy must be legible; the second instructs the user to click a link to download forms and attach them to their request. The main heading is 'Signature Forms for Printing', with a note that these forms are for manual or wet signatures. A bulleted list shows 'Signature Forms' as the selected option. At the bottom, there are 'Back' and 'Next' buttons.

4. In the Adobe Reader software, select the **print icon**.
5. After the forms print, sign and date the release forms and certification statement:
  - a. Use black ink
  - b. Sign your name exactly as it appears in e-QIP (e.g., "John David Smith")
  - c. Sign and date inside the signature box
  - d. Any corrections or overwrites must be completed using a new signature form or by drawing a single line through the error and initialing the correction
6. Close the Acrobat Reader window by clicking the **X** button in the upper right corner.
7. You will now be back at the Signature Forms for Printing page, click **Next**.
8. Return to [section 8.2](#) of this guide for help finishing your submission.

## APPENDIX B: Upload Attachments or Signature Pages

If you are going to upload an electronic image from your computer follow the below instructions. If you are going to upload documents with a fax machine, go to [Appendix C](#). If you are going to send or give your documents to your sponsoring agency outside of e-QIP go to [Appendix D](#).

1. Select **Upload File**
2. Select **Next**

Help - Return To Menu - Logout OMB No. 3206-0005

Step 4 of 5: Add Attachment Method

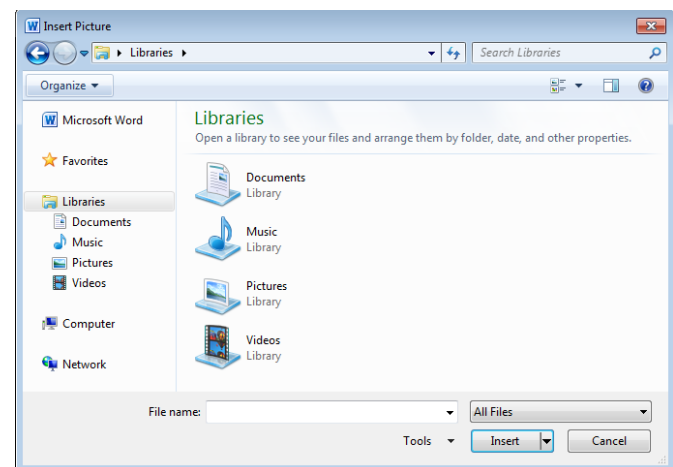
Use any of the following methods to provide attachments for your investigation Request:

- Upload File - Upload to e-QIP Directly - scan and electronically upload directly to your e-QIP request (must be done prior releasing the request)
- Direct Fax - Fax Attachment to e-QIP Directly, e-QIP offers an automated fax solution to attach a fax to your Investigation Request. Print a cover sheet and fax to the telephone number listed on the cover sheet (must be done prior releasing the request).
- Expected - Standard Fax, Mail, or Other - if not using one of the two methods above, indicate how you plan to provide each attachment

Specify method to be used to provide your attachment?	Upload File	Direct Fax	Expected
	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Back Next

3. Choose the file you wish to upload by clicking the **Browse** button and navigating to where you saved it on your computer.



4. Select the file you want to upload and click **Insert**

5. Ensure the file shows up in the attachment block and type a description in the Description field

6. Select **Upload Attachment**

7. Repeat to add other documents or signature pages as attachments. If done adding attachments, click **Return to Attachments Summary** and go to [section 9](#).

The screenshot shows a web interface for uploading a file. At the top, it says "Step 4 of 5: Add Attachment :: Upload File to e-QIP Directly". Below this is a section titled "Upload File" with instructions: "Select the attachment by browsing for a file on your local system through the use of the 'Upload File' button. Once a file is selected, type a description of the file in the appropriate 'Description' field. Finally, upload the file into the system by clicking the 'Upload Attachment' button." There is a sub-section "Uploaded file Specification" which states: "e-QIP only accepts attachments in Tag Image File (.tif or .tiff), Portable Network Graphics (.png), or Portable Document Format (.pdf) format. Also, the maximum file size allowed is 5 MB. The recommended scanning specification include a resolution of 300 dpi and bi-tonal, not color scanning." Below this is a "NOTE: Certification, General Release and Medical Release forms must be attached separately as single page documents. Items such as a resume or QF 612 can be uploaded as multi-page documents." The main form area has a label "Uploaded Attachment (TIF, PDF, or PNG files only)" next to a "Browse..." button, and a "Description" text input field. At the bottom of the form is an "Upload Attachment" button. Below the form is a "Return to Attachments Summary" button. The top right corner of the page shows "CMB No. 3208-0005".

## APPENDIX C: Fax Attachments or Signature Pages

The attachments are the Signature Forms and any other information, such as a resume, that you would like to provide your sponsoring agency as a part of your investigation. This option allows you to upload those attachments directly to your e-QIP form before sending the completed e-QIP to your sponsoring agency.

**Note:** Contact your sponsoring agency if you have any questions or need fax numbers or mailing addresses.

1. Select **Yes** or **No** to indicate if you want to work with attachments
2. Select **Next**

This screenshot shows the 'Step 4 of 5: Attachments Summary' screen. It includes instructions on how to upload files or use direct fax attachments. Below the instructions is a table titled 'Directly Attached / Expected Attachments' which is currently empty, with a 'Refresh' button. At the bottom, there is a question: 'Do you have a document and/or file that you would like to associate with this request?' with 'Yes' and 'No' radio buttons and 'Back' and 'Next' buttons.

3. Select **Direct Fax**
4. Select **Next**

This screenshot shows the 'Step 4 of 5: Add Attachment Method' screen. It lists three methods: 'Upload File', 'Direct Fax', and 'Expected'. The 'Direct Fax' option is selected with a radio button. Below the list is a question: 'Specify method to be used to provide your attachment?' with radio buttons for 'Upload File', 'Direct Fax', and 'Expected'. 'Back' and 'Next' buttons are at the bottom.

3. In the Fax Attachments to e-QIP Directly section, enter the number of pages for your document. Do not include the fax cover sheet in your number
4. Each separate Signature Form or other document you are attaching must be itemized separately and each has its own fax cover sheet
5. Type your phone number into the **Sender's Contact #** field
6. Select **Create Fax Cover Sheet**

This screenshot shows the 'Step 4 of 5: Add Attachment :: Direct Fax Attachment to e-QIP' screen. It provides detailed instructions for creating a fax cover sheet and attaching the document. Below the instructions is a form with two fields: 'Number of Attached Pages (excluding cover sheet)' and 'Sender's Contact #'. A 'Create Fax Cover Sheet' button is located below the fields. At the bottom, there is a 'Return to Attachments Summary' button.

This will create a fax cover sheet that will include your Request Number, Contact information, and a Barcode which will route the attachment to the correct Request in e-QIP.

Note: The fax cover sheet is active for only seven days. You will not be able to fax that cover sheet after that date has expired.


7. Print the fax cover sheet
8. Fax the cover sheet and the indicated document to the number provided on the cover sheet
9. Again, each separate item must have its own fax cover sheet

Electronic Questionnaires for Investigations Processing (e-QIP)  
Investigation Request # 1300422 For Applicant: 208 321-32-1654

Page 1 of 1  
Signature Forms

**Electronic Questionnaires for Investigations Processing (e-QIP)**  
**Investigation Request # 1300422**

**SIGNATURE FORMS**



The signature(s) in this document refer to information on forms submitted in the e-QIP Investigation Request # 1300422. The signature on the statement below is as valid as directly signing the same statement on a printed e-QIP Investigation Request # 1300422 Official Archival Copy. This signed statement and an image of each page from the e-QIP Investigation Request # 1300422 Official Archival Copy will be considered official record.

Sign and submit all forms in this document to the office that initiated your Investigation Request.

Data Hash Code (SHA-256):  
**e41bf6c8a5feb77b4e804aa303eb2beedd72244f8673669c154f00b3a0b9e04**  
Official Archival Copy PDF Hash Code (SHA-256):  
**96209e35e2f712492bd74334009f2f89baedc28f62802fe5a741274f42eaf45**  
Date/Time Certified in the e-QIP System: **2014-09-10 13:02:51**  
Applicant's Social Security Number: **321-32-1654**

**Questionnaire for Non-Sensitive Positions (SF85 Format)**  
OMB No. 3206-0261

**Certification That My Answers Are True**

My statements on this form, and any attachments to it, are true, complete, and correct to the best of my knowledge and belief and are made in good faith. I understand that a knowing and willful false statement on this form can be punished by fine or imprisonment or both. (See section 1001 of title 18, United States Code).

Signature (Sign in ink) \_\_\_\_\_ Date (mm/dd/yyyy) \_\_\_\_\_

---

e-QIP Version 3.09  
e-QIP Investigation Request # 1300422

PRIVACY ACT INFORMATION  
e-QIP Document Type CER

If the attachment is faxed successfully, it will appear in the Attachments Summary.

Help • Return To Menu • Logout CRM No: 1006-0005

Step 4 of 5: Attachments Summary

Use the following methods for attachments for your Investigation Request:

- Expected: Regular Fax, Mail, or Other - indicate how you plan to send each attachment

Existing Attachments					
#	Name/Description	Pages	Method	Action	
1	Signature Page	2	Faxed	<a href="#">Delete</a>	
2	Misc	2	Other	<a href="#">Delete</a>	

Question

Do you have an additional document and/or file that you would like to associate with this request?

Yes No

Back Next

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## APPENDIX D: Expected Attachments

Another option is to send items by regular fax or mail to your sponsoring agency:

1. Select **Expected**
2. Select **Next**
3. Provide a description for your attachment
4. Indicate how many pages it is
5. Select a method of transmission
6. Select **Add Expected Attachment**

Help - Return To Menu - Logout OIG No. 3236-005

Step 4 of 5: Add Attachment Method

Use any of the following methods to provide attachments for your Investigation Request:

- Upload File - Upload to e-QIP Directly - scan and electronically upload directly to your e-QIP request (must be done prior releasing the request)
- Direct Fax - Fax Attachment to e-QIP Directly, e-QIP offers an automated fax solution to attach a fax to your Investigation Request. Print a cover sheet and fax to the telephone number listed on the cover sheet (must be done prior releasing the request).
- Expected - Standard Fax, Mail, or Other - If not using one of the two methods above, indicate how you plan to provide each attachment

Specify method to be used to provide your attachment?

Upload File   Direct Fax   **Expected**

Help - Return To Menu - Logout OIG No. 3236-005

Step 4 of 5: Add Attachment :: Expected - Standard Fax, Mail, or Other

**Expected - Standard Fax, Mail or Other**

Add a non-uploaded attachment by providing the following information:

1. Enter "Name/Description"
2. Provide the "Number of Pages"
3. Select the "Method of Transmission"

NOTE: Write your social security number and the Request ID number (71750) on the margin of each attachment you submit.

**Regular Fax, Mail, or Other**

Name/Description  Help

Number of Pages

Method of Transmission  ▼

## APPENDIX E: Two-Factor Authentication

### Step 1

If you want to use two-factor authentication for future logins by linking your e-QIP account to a device of your choosing you must FIRST click the link “More information” for instructions on what to download on your device. Ensure you choose a device you will have access to the next time you wish to login to e-QIP.

Help OMB No. 3206-0005

### e-QIP Optional Two-Factor Authentication

e-QIP provides enhanced applicant security with a Two-Factor Authentication setup. You may choose to enroll and set up this extra layer of security now, or decline to be asked later. You will need to install an app on your smartphone or an application on your computer to utilize two-factor authentication.

#### Advantages of two-factor authentication

- Enhanced account security
- Multiple layers of protection
- Regular password updates
- It's free

[More information](#)

### Step 2

The instructions on the screen give an overview of the process you will need to follow. FIRST you will need to download a two-factor authentication application to your smartphone, computer or tablet. Again, ensure you choose a device that you will have access to the next time you need to log into e-QIP. After reading the instructions and downloading the application of your choosing to the device of your choice, you may close the browser window or tab within the browser that is displaying the instructions in order to return to the enrollment screen.

OMB No. 3206-0005

## e-QIP - More Information on Two-Factor Authentication

### What is two-factor authentication?

Two-factor authentication adds an additional layer of security to your login by requiring information from a second login factor to access your account. Examples of login factors include:

<input type="text" value="user123"/> <input type="password" value="*****"/>	<b>Something you know</b> username, password		<b>Something you have</b> smartphone, tablet, laptop		<b>Something you are</b> fingerprint, retina
--	---	--	---	--	---

### Why should I use two-factor authentication?

Using two different factors of authentication protects your account by preventing remote attackers from gaining access with just your username and password. Remote attackers cannot pretend to be you without access to you or your physical device.

### How do I setup two-factor authentication in e-QIP?

- 1. Install a two-factor authentication application on your device**  
There are a number of free two-factor authentication applications (e.g., Google Authenticator, FreeOTP) that support a wide range of operating systems including Android, iOS, Windows, and Mac OS
- 2. Add your e-QIP shared secret to your two-factor authentication application**  
Scan the QR code or enter your shared secret provided by e-QIP into your two-factor authentication application. Just follow the instructions provided by your preferred application to associate two-factor authentication with your e-QIP account.
- 3. Complete enrollment in e-QIP**  
After setting up your application, complete enrollment by following the instructions provided by e-QIP.

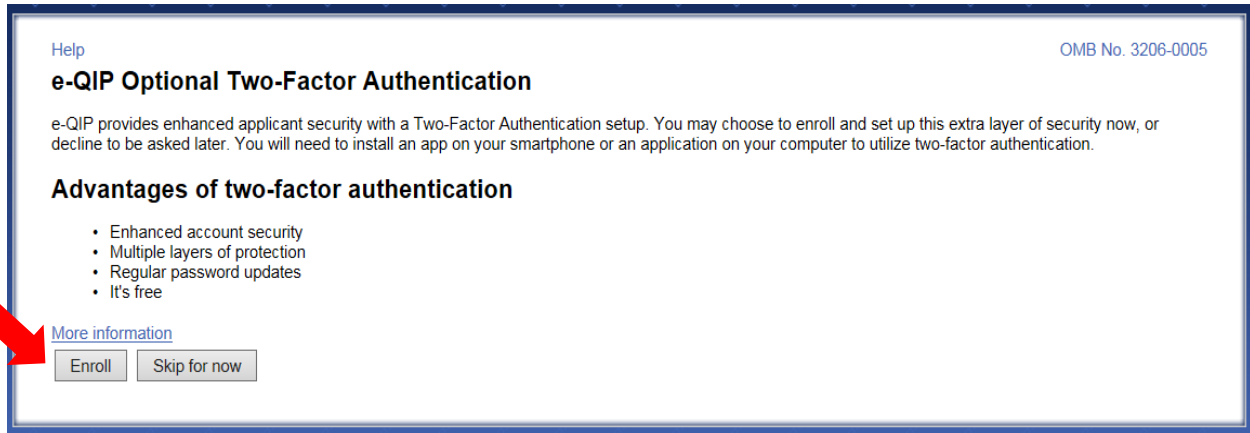
### How do I login to e-QIP using two-factor authentication?

After you have successfully enrolled in e-QIP two-factor authentication, you will login into e-QIP using your username and password. After providing these credentials, you will be asked to enter the verification code generated by your two-factor authentication application. Depending on the application you have chosen, you may be able to receive verification codes via text message, push notifications, or phone calls to your smartphone or a designated landline. You may also have the option of storing offline passcodes on your device in the event that your device does not have internet connectivity or cell reception.

### Are there standards and guidelines associated with two-factor authentication?

### **Step 3**

Now that you have installed a two-factor authentication application, you may select the **“Enroll”** button.



Help OMB No. 3206-0005

### **e-QIP Optional Two-Factor Authentication**

e-QIP provides enhanced applicant security with a Two-Factor Authentication setup. You may choose to enroll and set up this extra layer of security now, or decline to be asked later. You will need to install an app on your smartphone or an application on your computer to utilize two-factor authentication.

#### **Advantages of two-factor authentication**

- Enhanced account security
- Multiple layers of protection
- Regular password updates
- It's free


[More information](#)

© QIP 2.20 (UAT)



## Step 4

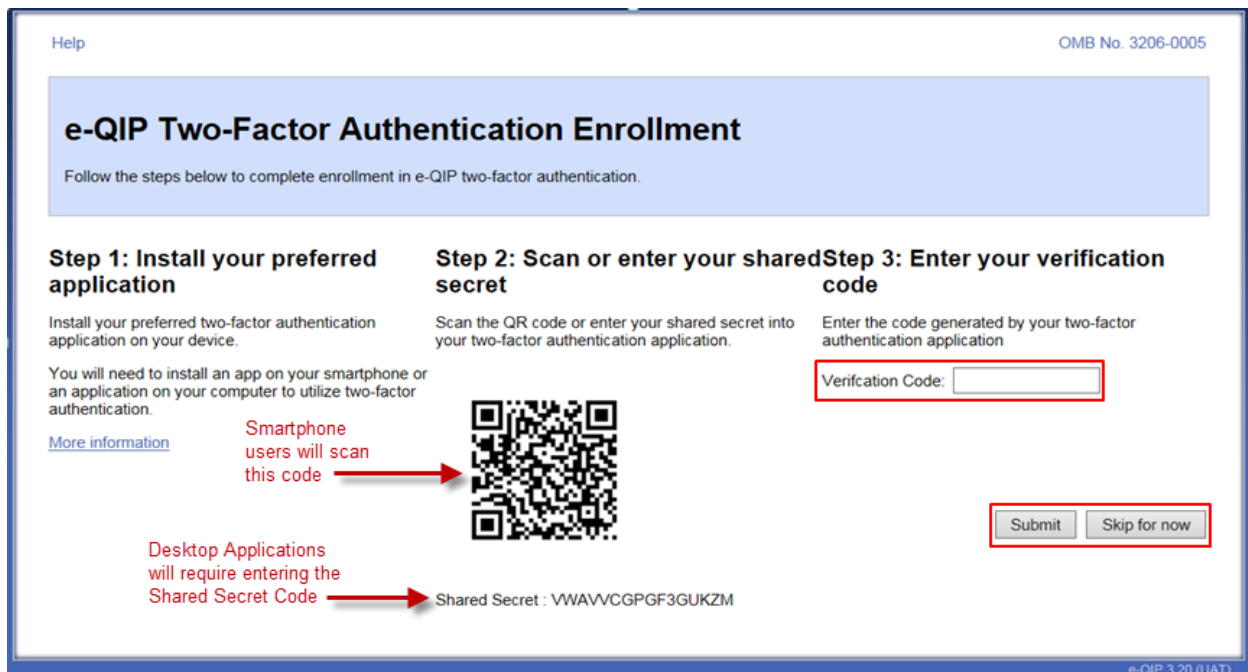
Now that you have an authentication application:

For *smartphones* or *tablets* that can use the QR Barcode (e.g. ): Open the authentication application, manipulate the application to where it is ready to image the QR barcode and hold the smartphone or tablet up to the computer screen. Enter the six-digit number that generates into the “Verification Code” field and then click the **“Submit”** button.

For *computers, smartphones, or tablets* with authentication applications that require the “Shared Secret” code instead of the QR Barcode: Open the authentication application, manipulate the application to where it is asking for the Shared Secret code and enter the code shown on the e-QIP screen. Enter the six-digit number that generates into the “Verification Code” field and then click the **“Submit”** button.

**Note:** This code changes every 30-45 seconds so it must be entered correctly and quickly.

You may choose ‘Skip for now’ at any time in order to continue without the Two-Factor authentication in which case you should arrive at the screen to enter your information (Step 11 in this guide).



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### e-QIP Two-Factor Authentication Enrollment

Follow the steps below to complete enrollment in e-QIP two-factor authentication.

**Step 1: Install your preferred application**


Install your preferred two-factor authentication application on your device.

You will need to install an app on your smartphone or an application on your computer to utilize two-factor authentication.

[More information](#)

**Step 2: Scan or enter your shared secret**

Scan the QR code or enter your shared secret into your two-factor authentication application.

  
Shared Secret : VWAVCGPGF3GUKZM

**Step 3: Enter your verification code**

Enter the code generated by your two-factor authentication application

Verification Code:

e-QIP 3.20 (UAT)

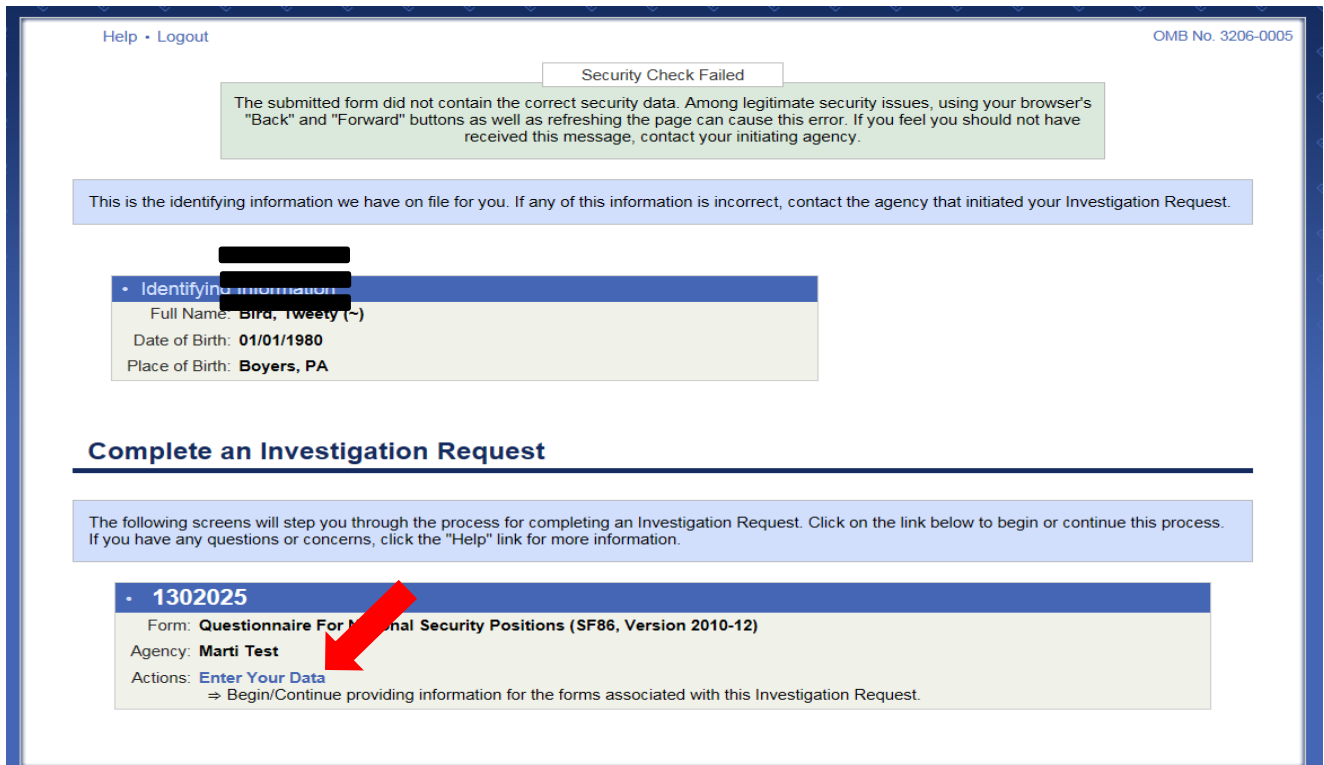
## Step 5

You will see the following Encryption Confirmation Screen, while your request is processing.



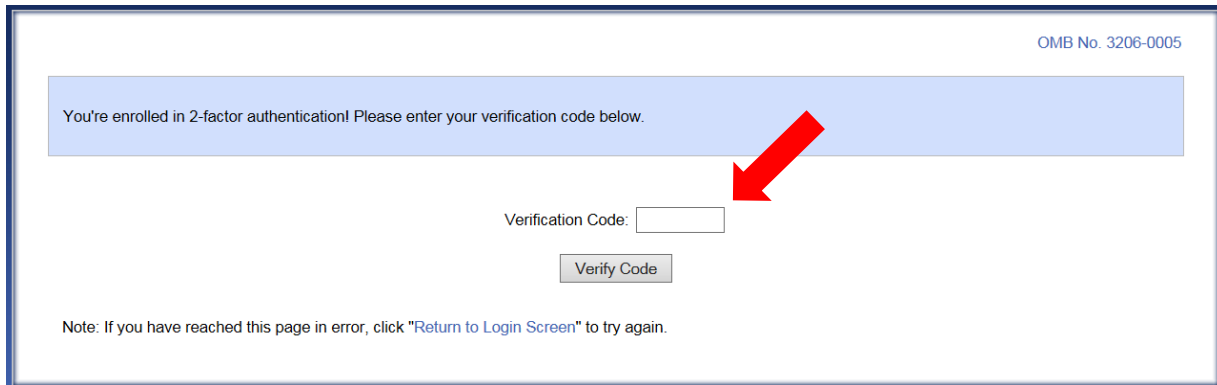
## Step 6

You may now begin entering your data into the investigative form by clicking the link **“Enter Your Data”**. Proceed back to [section 5](#) of this guide for more help. If you have more than one agency requesting your information you may have more than one Questionnaire from which to choose. If you need help determining which form to begin entering data into, contact your sponsoring agency for help.



**Note for Future Logins:** The next time you login to e-QIP, after entering your username and password you will be prompted only to enter the six-digit verification code. (As shown below.) You simply need to open the authentication application and retrieve the current six-digit number presented. You do not need to scan a QR Barcode or enter a Shared Secret as the device is already associated with your e-QIP account.

If you no longer have access to the device with the authentication application you may request your sponsoring agency to perform an “authentication reset” which will require you to login to e-QIP as if it were your first time logging in.



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You're enrolled in 2-factor authentication! Please enter your verification code below.

Verification Code:

Note: If you have reached this page in error, click "[Return to Login Screen](#)" to try again.