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.

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.

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 NBIB 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.

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 18th 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 your 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.
- 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-investigations/

   The e-QIP Application Page will
   appear.

2. Select the button labeled **Enter e-
   QIP Application,** or select the
   Enter e-QIP option on the left
   side navigation bar.

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 welcome message introducing the updated design that was published July 2018.After reading the message click **OK**.
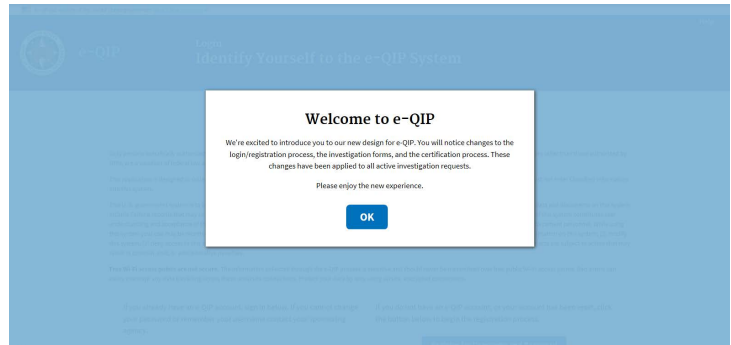
2. If this is your first time in e-QIP, or if you have recently had your account (password) reset by your sponsoring agency, select **Register for Username and Password.**

   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.

3. If you have a Social Security Number (SSN)
   a. Type your SSN into the **Social Security Number** field

   b. Select **Submit**

   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.
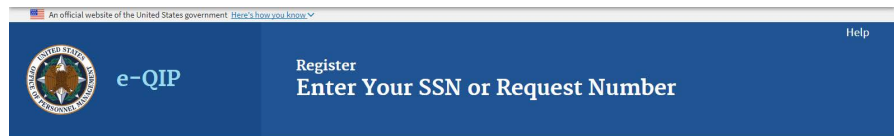
4.2.2   Golden Questions and Registration Code

Note: To see your answers as you type, check the box, "**Allow me to see my Golden Answers 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**

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**

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**

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. 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 E 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.
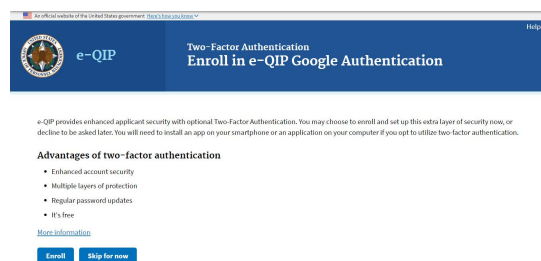
5   Entering Your Information

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 or Begin/Resume Request**.

   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.
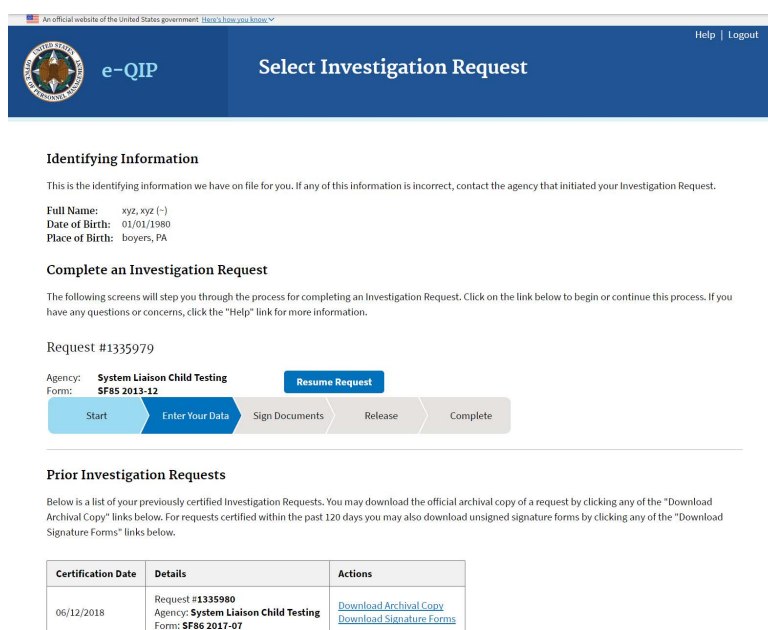
5.2   Reviewing the Form Completion Instructions

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).

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 may 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** menu located on the left of the screen to go to any section of the form in any order. 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.

5.4.2 Section 8 – U.S. Passport Information

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

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.

5.4.3 Section 9 – Citizenship

Indicate your citizenship status.

If you were born in Palau or Micronesia/Marshall Islands, please review the respective document below regarding your citizenship status:
Palau: https://save.uscis.gov/web/media/resourcesContents/CFA_PAL.pdf
Micronesia/Marshall Islands: https://save.uscis.gov/web/media/resourcesContents/CFA_MIS.pdf

To view and get more information on immigration documents, please select the link below:
https://save.uscis.gov/web/media/resourcesContents/SAVEGuideCommonlyusedImmigrationDocs.pdf

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.

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

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.

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.

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).

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.

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.

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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. 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.

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.

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.

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 legally recognized civil union/ domestic partner, 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).

5.4.12 Section 20a – Foreign Activities

You must indicate whether you, your spouse or legally recognized civil union/ domestic partner, your cohabitant, or your dependent children have EVER had any foreign financial interests such as stocks, property, investments, bank accounts, businesses, ownership of corporate entities, corporate interests or exchange traded funds (EFTs) 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.

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

There are a series of 9 questions in section 20b. These questions can request information from the past 7 years or in some cases, they will ask if they have EVER occurred. Please read the questions carefully to ensure the information is correct.

If you answer **Yes** to any of the questions you will be prompted to provide additional information.

5.4.14 Section 21 – Psychological and Emotional Health

1. Indicate whether or not a court or administrative agency has EVER issued an order declaring you mentally incompetent.

    If you answer **Yes**, you will be prompted to provide the date of occurrence, name, address and if the matter was appealed.

2. Indicate whether or not a court or administrative agency has EVER ordered you to consult with a mental health professional.

    If you answer **Yes**, you will be prompted to provide the date of occurrence, name, address, disposition and if the matter was appealed.

3. Indicate whether or not you have EVER been hospitalized for a mental health issue.

    If you answer **Yes**, you will be prompted to provide the dates of treatment, name, address, explanation and if the admission was voluntary or not.

4. Indicate whether or not you have EVER been diagnosed by a physician or other health professional with psychotic disorder, schizophrenia, schizoaffective disorder, delusional disorder, bipolar mood disorder, borderline personality disorder, or antisocial personality disorder.

   If you answer **Yes**, you will be prompted to provide the diagnosis, dates, name, address, number and an explanation.

5. Indicate whether or not you have a mental health or other health condition that substantially adversely affects your judgement, reliability, or trustworthiness even if you are not experiencing such symptoms.

   If you answer **Yes**, you will be prompted to indicate whether you have ever received or are currently receiving counseling or treatment for that condition.

   If you answer **Yes**, you will be prompted to provide the dates of treatment, name, address, explanation and telephone number.

   Note: If you answered **Yes** to any of the questions in section 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 23 – Illegal Use of Drugs or Drug Activity

Note: Questions pertain to the illegal use of drugs or controlled substance activity in accordance with Federal laws, even though permissible under state laws.

5.4.16 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.

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.

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 Validation Summary below shows in the header that the Errors are present in Sections 18 through 29. A link to each section error will be displayed for quick navigation.

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

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**" or "**Error**" 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.

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 navigation menu on the left and choose the Validate, Review and Certify section**.**

4. When the validation results show no more Errors or Warnings, select **Continue**.

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 30-60 seconds.

6. Select **OK**.

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".

    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 and click **Continue.**

3. 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 select **"Click Here to Sign"**, you will no longer be able to go back and make corrections.

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

   Click **Continue**

5. 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.

6. **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.

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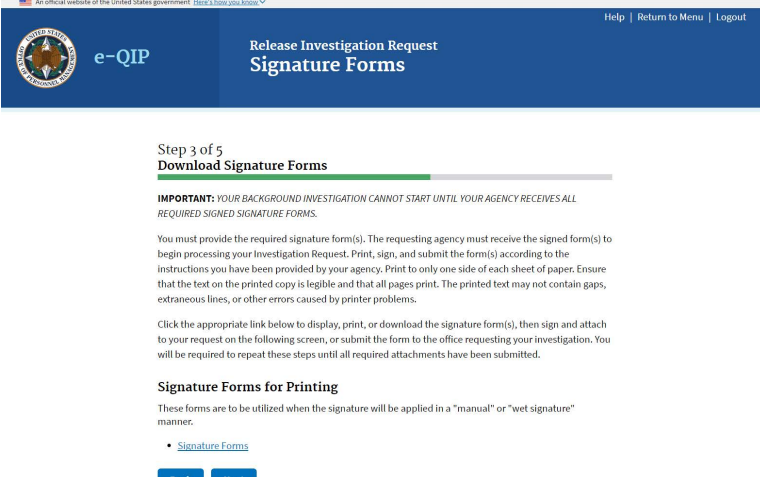
In the event you are contacted to make corrections to your form, you will need to:

- 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.

APPENDIX A: Signature Process for Pen and Ink Signatures

1. Select the **Signature Forms** link displayed under Step 3 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.

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 instructions below. 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.
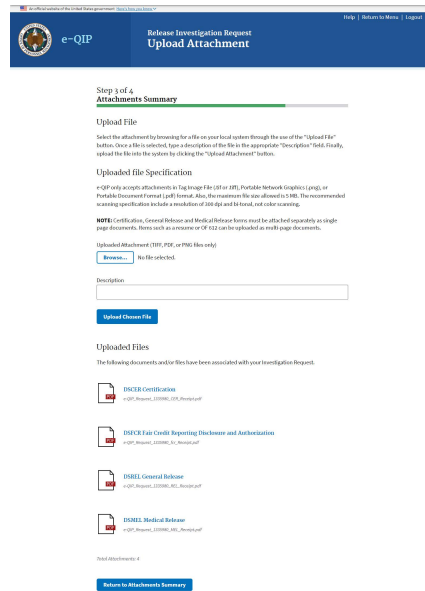
1. Select **Upload File**

2. Select **Next**

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.

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 you 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**

3. Select **Direct Fax**

4. Select **Next**

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 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

FOR OFFICIAL USE ONLY

Request ID: 1336012
Applicant Name: xyz, xyz (~)
Attachment Type: (APP)
Attached Pages (Excluding Cover Sheet): 1
Sender Contact #: 1111111111
Cover Sheet is Invalid After: Jun 22, 2018 at 10:02 EDT

Instructions:
1. Print this cover sheet. The barcode must print as a black and white image.
2. Put cover sheet on top of the corresponding document.
3. Fax cover sheet and document to (202) 606-2340.
4. If successful, the fax will be attached to the Request ID specified at the top of this page.
5. If the faxed attachment does not show up within ten minutes in the "Directly Attached" list and your fax machine indicates that the fax was successfully sent, contact the agency that initiated your Investigation Request.

DISCLAIMER
THE DOCUMENTS ACCOMPANYING THIS FAX TRANSMISSION MAY CONTAIN SENSITIVE INFORMATION WHICH IS PRIVILEGED AND IS BEING PROVIDED FOR OFFICIAL GOVERNMENT USE ONLY AND IS PROTECTED FROM UNAUTHORIZED DISCLOSURE BY THE PRIVACY ACT.

IF YOU HAVE RECEIVED THIS TELECOPY IN ERROR, PLEASE IMMEDIATELY NOTIFY THE SENDER AT 1111111111 TO ARRANGE FOR RETURN OF THE ORIGINAL DOCUMENTS TO THE SENDER.

FOR OFFICIAL USE ONLY

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

An official website of the United States government Here's how you know ∨

Return to Menu | Logout

e-QIP

Release Investigation Request
Attachments Summary

Step 4 of 5
Attachments Summary

Use the following methods for 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 before releasing the request)
- **Direct Fax:** Fax Attachment to e-QIP Directly - print a cover sheet and fax to the telephone number listed on the cover sheet (must be done before releasing the request)
- **Expected:** Regular Fax, Mail, or Other - if not using one of the two methods above, indicate how you plan to send each attachment

Directly Attached / Expected Attachments

The following documents and/or files have been associated with your Investigation Request.

Signed Certification Page
signature page.pdf

🗑
Delete

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

[Yes] [No]

[Back] [Next]

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**

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.
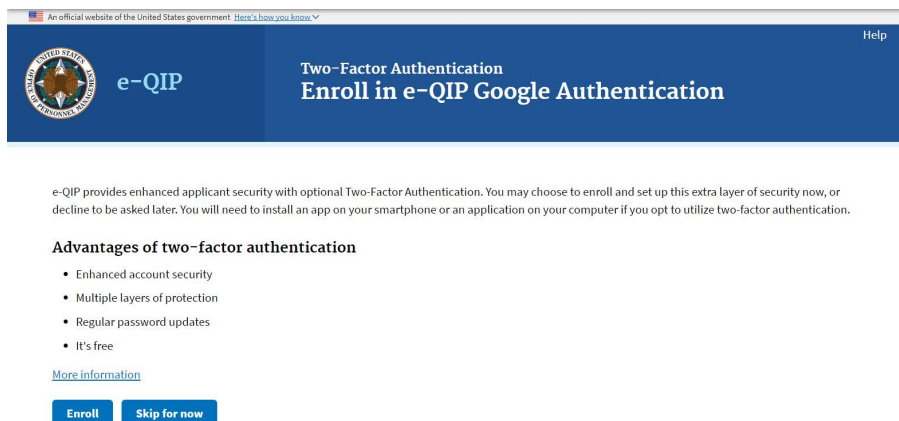
Step 2

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.
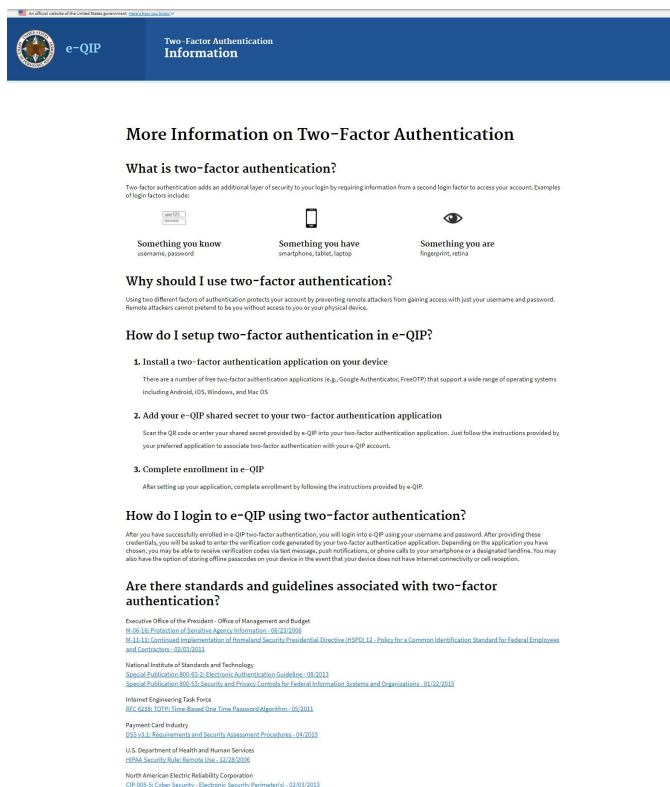
Step 3
Now that you have installed a two-factor authentication application, you may select the *"Enroll"* button.

An official website of the United States government Here's how you know ∨

Help

e-QIP

Two-Factor Authentication
Enroll in e-QIP Google Authentication

e-QIP provides enhanced applicant security with optional Two-Factor Authentication. 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 if you opt 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

Enroll   **Skip for now**

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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Step 5

You may now begin entering you 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.