

# DISS JVS JOB AID

Moving SMO within Hierarchy in the  
Joint Verification System

DEFENSE COUNTERINTELLIGENCE AND SECURITY AGENCY

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# Hierarchy Management 101



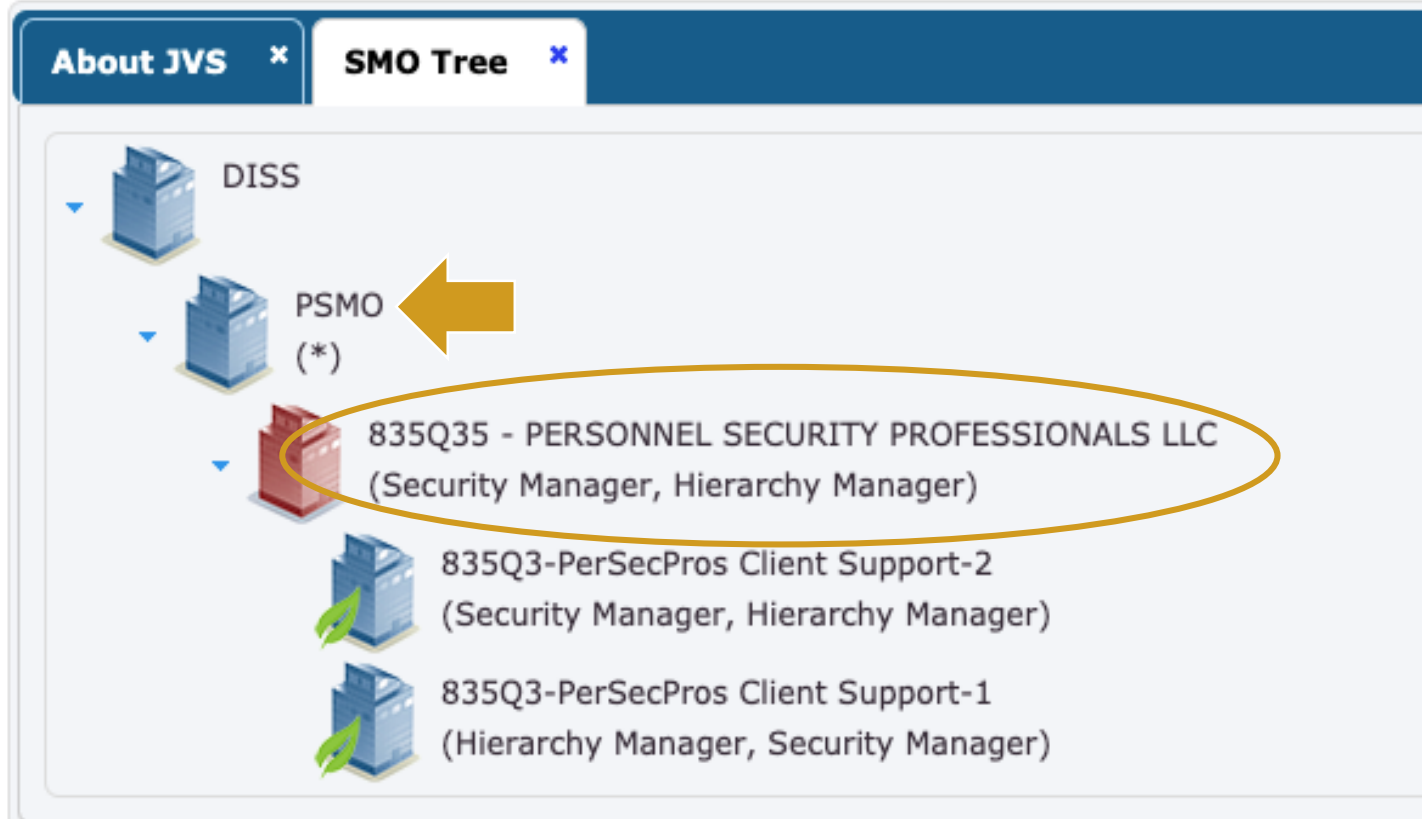
- When data migration occurred, JPAS Levels were transferred to different SMOs in DISS. This means if a user was provisioned for Level 2, 4 and 5 for SMO 12AB3 in JPAS, there are now three SMOs in DISS, one for each level (12AB32, 12AB34 and 12AB35).
- In order to accurately assess the Hierarchy needs, users should understand the scope of their hierarchy by searching for all SMOs associated with their CAGE Code.
- All SMOs should be managed at the highest Parent with at least one Hierarchy Manager.
- It is important that all CAGE Codes within the hierarchy tree can be accessed and managed by a Security Manager/Officer. This can be done through provisioning for each SMO, or configuring the hierarchy to account for all SMOs and provisioning for Security Manager at the highest Parent level.

# Hierarchy Management 101 (cont.)



- Think of a SMO (Security Management Office) tree like a company's org chart, the person at the top is responsible for the organization(s) below them. A manager in one branch can't take action on another manager's team that is at a higher level.
- The SMO tree is the same concept. As an example, let's replace people in the org chart with SMOs, a small company may have a flat org chart and only one SMO they are responsible for, while larger companies may have many and need to segment certain SMOs from others.
- If you have more than 75 children/grandchildren SMOs, you will not be able to see your Hierarchy in the application. For resolution, you will need to contact the DMDC Contact Center / VROC.

# Know Your Current Hierarchy



Within the SMO Tree you have Parent SMOs and Child SMOs, these are at different levels within the SMO tree.

Hierarchy Managers should ensure they are operating at the highest SMO with PSMO (VROC) as the parent SMO for Industry.

# Select Search SMOs



If you do not have the Search SMOs option, please work with your Hierarchy Manager to determine your role/permission setup.

Ensure that your current SMO is set for the SMO you are working or at the Highest SMOO in your Branch.

A screenshot of a software interface for selecting Search SMOs. The interface has a dark blue header with a dropdown arrow and the text "SMO". Below the header, there is a list of options: "View Current SMO", "View SMO Tree", "Search SMOs", "Create SMO", and "View SMO Visits". The "Search SMOs" option is highlighted with a yellow background, and a large yellow arrow points to it from the right. Below the list, there is a section titled "Current SMO:" followed by a dark blue button with the text "835Q35 - PERSONNEL SECURI" and a small dropdown arrow. At the bottom, there is a grey button with the text "Set Default SMO".

▼ SMO

- View Current SMO
- View SMO Tree
- Search SMOs
- Create SMO
- View SMO Visits

**Current SMO:**

835Q35 - PERSONNEL SECURI ▼

Set Default SMO



# Search SMOs



1. Type the 5 digit CAGE Code in the SMO Name and select “Search”.

The screenshot shows the 'Find SMO' search interface. A yellow star with the number '1' points to the 'SMO Name' field, which contains the text '835Q3'. A yellow arrow points from the 'Search' button at the bottom right towards the 'SMO Name' field. The interface is divided into three sections: 'SMO Attributes', 'Organization Attributes', and 'Location Attributes'. The 'SMO Attributes' section contains the 'SMO Name' field. The 'Organization Attributes' section contains fields for 'CAGE Code', 'Unit Identification Code', 'U.S. Joint Organization' (a dropdown menu currently showing 'Select Joint Organization Code'), 'U.S. Agency Code', 'Service Organization Code', 'Non U.S. Agency Code', and 'Sub Agency Code'. The 'Location Attributes' section contains fields for 'Address Line 1', 'Address Line 2', 'City', 'State' (a dropdown menu currently showing 'State/Territory'), 'Zip Code', and 'Country' (a dropdown menu currently showing 'Country'). At the bottom right, there are 'Search' and 'Reset' buttons.

**Find SMO**

**SMO Attributes**

SMO Name: 835Q3

**Organization Attributes**

CAGE Code:  Unit Identification Code:

U.S. Joint Organization: Select Joint Organization Code U.S. Agency Code:

Service Organization Code:  Non U.S. Agency Code:

Sub Agency Code:

**Location Attributes**

Address Line 1:  Address Line 2:

City:  State: State/Territory

Zip Code:  Country: Country

Search Reset

# SMO Results



2. Select the appropriate SMO to be moved

\*In many instances, searching for the 5 digit CAGE will result in multiple SMOs. The SMO Parent identifies where in the hierarchy that SMO sits. If the SMO Parent is not accurate, a SMO move or Hierarchy Change Request will be required.

SMO Name	Status	Organization	Organization Type	SMO Parent
835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC	Active	PERSONNEL SECURITY PROFESSIONA	Contracting Organization or Vendor	PSMO
835Q3-PerSecPros Client Support-2	Active	PERSONNEL SECURITY PROFESSIONA	Contracting Organization or Vendor	835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC
835Q3-PerSecPros Client Support-1	Active	PERSONNEL SECURITY PROFESSIONA	Contracting Organization or Vendor	835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC

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# SMO Actions



3. Select “**Move SMO**” from the SMO Actions tab, this will bring up the ability to search for the new Parent.

\* If you do not get the “**Move SMO**” option, you can select “**Make Current SMO**” if available. This is due to the SMO not being in the hierarchy of the SMO you’re currently operating as. If no SMO Actions are available, a Hierarchy Change Request (HCR) will need to be submitted.

The screenshot displays the 'SMO Details' tab in the JVS system. The 'General Information' section shows details for SMO 835Q3-PerSecPros Client Support-1 (Active). Below this, there is a table for 'SMO Location (0)'. A yellow starburst with the number 3 points to the 'SMO Actions' dropdown menu, which is open and shows the 'Move SMO' option circled in orange.

Address	City	State	Zip+Ext.	Country
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# Search for New Parent



4. Type the 5-digit CAGE Code or SMO Name for the desired Parent. Select **“Search”**. The SMO Name appears below.
5. Select the desired Parent.

**Move SMO**

**Find SMO**

**SMO Attributes**

SMO Name: 835Q3

**Organization Attributes**

CAGE Code:  Unit Identification Code:

U.S. Joint Organization: **Select Joint Organization Code** U.S. Agency Code:

Service Organization Code:  Non U.S. Agency Code:

Sub Agency Code:

**Search** **Reset**

SMO Name	Status	Organization	Organization Type	SMO Parent
835Q3-PerSecPros Client Support-2	Active	PERSONNEL SECURITY PROFESSIONA	Contracting Organization or Vendor	835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC

# Move SMO Confirmation



5a. If the SMO is already in your Hierarchy, a pop-up will confirm the movement with the chosen parent. Selecting “**Move SMO**” will finalize the process

Move SMO Confirmation

Are you sure you want to move this SMO?

Move SMO:

835Q3-PerSecPros Client Support-1

From Parent SMO:

835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC

To Parent SMO:

835Q3-PerSecPros Client Support-2

Move SMO

Cancel

# Move SMO CSR



5b. If the SMO is currently outside of the chosen Hierarchy, a **Customer Service Request** (CSR) will be created and sent to the new Parent SMO. This may also occur if the SMO is in a “Transient” status.

A screenshot of the 'Create CSR' form in the JVS system. The form has a blue header with three tabs: 'About JVS', 'SMO Tree', and 'Create CSR'. Below the header, there are two main sections: 'Task Details' and 'Request Details'. In the 'Task Details' section, 'Request Type' is 'Move SMO Request' and 'Description' is 'Create Move SMO Request', both highlighted with a yellow arrow. The 'Request Details' section contains fields for 'Move SMO' (835Q3-PerSecPros Client Support-1), 'From Parent SMO' (835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC), and 'To Parent SMO' (835Q3-PerSecPros Client Support-2). There is also a 'Comments' field with a 2000 character limit. At the bottom left, there is a green 'Create' button, also highlighted with a yellow arrow.

# Finding Move SMO CSR



- If a CSR was created, the Hierarchy Manager of the new Parent can view the CSR under the “**Task Inbox**” by searching for the CSR. Ensure that the timeframe is accurate or disabled. The Task will be for **Hierarchy Manager**, select the checkbox for **CSR** and select “**Move SMO Request**” under the **CSR Task Names**, select search.

The screenshot shows the 'Task Inbox' interface with the 'Unassigned Tasks' tab selected. The search criteria section includes fields for 'Period' (Last Day), 'From Date' (2020/05/25), 'To Date' (2020/05/26), 'Task For' (Hierarchy Manager), and 'Available Tasks' (checked for CSR). A bracket on the right side of the date fields is labeled 'Search timeframe'. A yellow arrow points to the 'Search' button. Below the search criteria, a table titled 'Active Tasks Unassigned (1)' displays the results.

Task Name	Description	Task Owner	Task For	Due Date
Move SMO Request - Review Move SMO Request	Review Move SMO Request regarding 835Q3-PerSecPros Client Support-1		Hierarchy Manager	2020/05/29

# Claim Move SMO CSR



7. After selecting the appropriate CSR, select “**Claim**” to process CSR.

A screenshot of the "Move SMO Request" form in the JVS system. The form has a blue header bar with tabs for "About JVS", "Task Inbox", and "Move SMO Request". Below the header, there are two main sections: "Task Details" and "Request Details".  
**Task Details:**  
Request Type: Move SMO Request  
Description: Review Move SMO Request regarding 835Q3-PerSecPros Client Support-1  
Assignee:  
Due Date: 2020-05-29 18:35:22  
**Request Details:**  
Move SMO: 835Q3-PerSecPros Client Support-1  
From Parent SMO: 835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC  
To Parent SMO: 835Q3-PerSecPros Client Support-2  
Request Comments: (text input field)  
Comments: (text input field)  
2000 characters remaining  
At the bottom of the form, there are three buttons: "Approve", "Claim", and "Unclaim". A yellow arrow points from the "Approve" button to the "Claim" button.

The SMO Move Request CSR is valid for 72 Hours. VROC and the DISS Team are working together to process these CSRs in a timely manner.



# Approve/Reject Move SMO CSR



8. Once claimed, the Hierarchy Manager will have the ability to “**Approve**” the request which will finalize the move. Rejecting the request will close out the CSR and the move will be terminated.

A screenshot of the "Move SMO Request" interface. The interface has a top navigation bar with tabs for "About JVS", "Task Inbox", and "Move SMO Request". Below the navigation bar, there are two main sections: "Task Details" and "Request Details". The "Task Details" section shows: Request Type: Move SMO Request, Description: Review Move SMO Request regarding 835Q3-PerSecPros Client Support-1, Assignee: NICHOLAS JAMES LEVASSEUR, and Due Date: 2020-05-29 18:35:22. The "Request Details" section shows: Move SMO: 835Q3-PerSecPros Client Support-1, From Parent SMO: 835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC, and To Parent SMO: 835Q3-PerSecPros Client Support-2. Below these details are two text input fields for "Request Comments" and "Comments". At the bottom of the interface, there are four buttons: "Approve", "Reject", "Claim", and "Unclaim". A yellow oval highlights the "Request Details" section, and a yellow arrow points to the "Approve" button.

Task Details	
Request Type:	Move SMO Request
Description:	Review Move SMO Request regarding 835Q3-PerSecPros Client Support-1
Assignee:	NICHOLAS JAMES LEVASSEUR
Due Date:	2020-05-29 18:35:22

Request Details	
Move SMO:	835Q3-PerSecPros Client Support-1
From Parent SMO:	835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC
To Parent SMO:	835Q3-PerSecPros Client Support-2
Request Comments:	<input type="text"/>
Comments:	<input type="text"/>

2000 characters remaining

# Updated SMO Tree



When the SMO Move has been completed, your SMO Tree will reflect the change upon next login.



# Hierarchy Change Request



- If there are SMOs not within your hierarchy and you are not provisioned for the SMO, you will need to submit a [Hierarchy Change Request \(HCR\)](#).
  - The HCR must contain ALL SMOs related to your CAGE Code.
  - The HCR must show ONE parent that the Hierarchy Manager is provisioned under.
- Send the HCR to [dcsa.dcsa-northern.dcsa-dvd.mbx.diss-provisioning@mail.mil](mailto:dcsa.dcsa-northern.dcsa-dvd.mbx.diss-provisioning@mail.mil)
  - All identified SMOs will be moved to the ONE Parent.
  - The Hierarchy Manager will be able to configure their Hierarchy under the identified Parent SMO.

# HCR Submission Tip



\*\*When filling out the HCR, it's important that you use the exact SMO Name presented in DISS. This will assist the DISS analysts in ensuring they have the proper information to complete the move.

A screenshot of the "SMO Details" page in the JVS system. The page has a blue header with tabs for "About JVS", "SMO Tree", "SMO Search", and "SMO Details". Below the header is a "General Information" section. It displays the SMO name "835Q3-PerSecPros Client Support-1 (Active)" with a yellow highlight and a pencil icon. Below the name are fields for "Parent SMO" (835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC), "Organization" (PERSONNEL SECURITY PROFESSIONA), "CAGE Code" (835Q3), "Clearance Level" (Top Secret), "Type" (Contracting Organization or Vendor), and "Home Office CAGE Code".

**General Information**

**\*\* 835Q3-PerSecPros Client Support-1 (Active)**

Parent SMO: [835Q35 - PERSONNEL SECURITY PROFESSIONALS LLC](#)

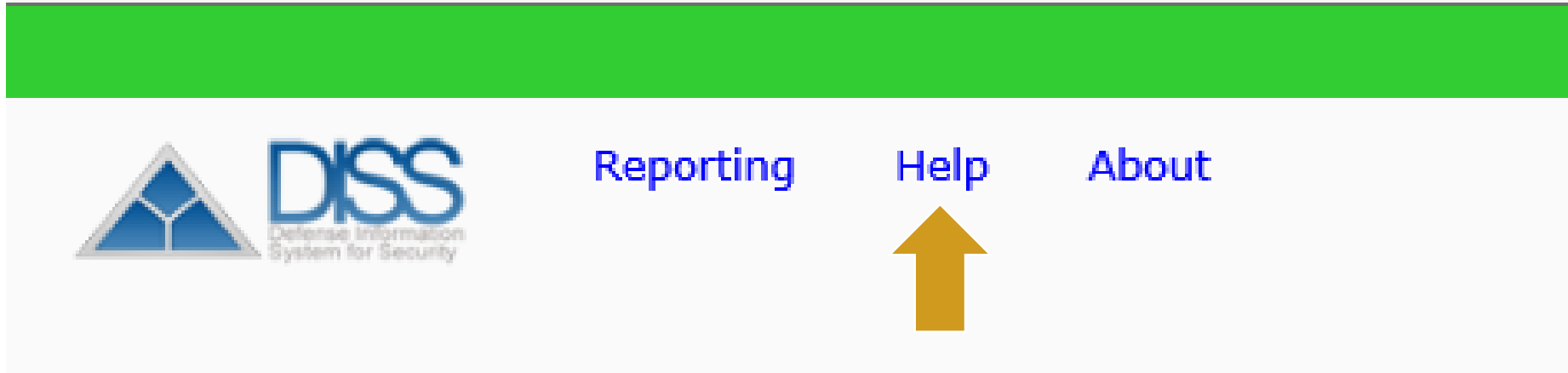
Organization: PERSONNEL SECURITY PROFESSIONA      Type: Contracting Organization or Vendor

CAGE Code: 835Q3      Home Office CAGE Code:

Clearance Level: Top Secret

HIERARCHY CHANGE (Parent-Child)	
SMO CHILD TO BE MOVED	NEW PARENT SMO
** 835Q3-PerSecPros Client Support 1	835Q3 - PerSecPros Client Support-2

# Questions



For more information about these DISS actions see the **Joint Verification System (JVS) and Reporting User Manual** which can be accessed in DISS in the upper left corner by clicking on Help or contact the **DISS Customer Call Center (CCC) at 1-800-467-5526**.

Note: If you encounter an issue with a specific record, be prepared to provide a screenshot via encrypted email.