

Overview of Release

- Whitelist Management Portal User Interface Redesign

Release Enhancements

Whitelist Management Portal User Interface Redesign

Description: Between August 2019 and January 2021, the Do Not Pay Portal underwent a major redesign based on user feedback. The purpose of this redesign was to improve the ease of navigation and increase the usefulness of the various functions. All functionalities have been upgraded and the Legacy Portal is now discontinued.

Redesigned Whitelist Management Module

Navigation Bar
Click on these icons to navigate to the various functionalities within the Portal.

Help
Click here to access the User Guide, Data Sources, Contact Us, and for guidance relevant to the current page.

Announcements
New messages will be posted here.

ISIM Self Service
Click to change your password

Whitelist Filters
Select and apply filters.

Logout
Click to log out of the Portal.

Whitelist Management
Click here to launch.

Whitelist Match Results
View filtered matches.

| Name | Data Source | Reason | Expiration Date | Details |
|------------------|---------------------|----------|---------------------|-------------------------------------|
| GRAHAM ADALYNN | 423781334 123456789 | DOD | Busin... 12/14/2020 | Cancel Apply Save/Print Detail Show |
| | 518448798 | DMF | Busin... 12/01/2020 | Cancel Apply Save/Print Detail Show |
| JOHNSON ADRIENNE | 896903217 987 | | 11/25/2020 | Cancel Apply Save/Print Detail Show |
| CHARLTON HOAG | 896903219 987 | | 11/25/2020 | Cancel Apply Save/Print Detail Show |
| REED CAMILA | 423781295 123456789 | DOD | No L... 11/25/2020 | Cancel Apply Save/Print Detail Show |
| BRYAN | 896903226 | AIS ORIT | No L... 11/25/2020 | Cancel Apply Save/Print Detail Show |

Release Enhancements (cont.)

Filters

- Using the dropdown menus, select the desired filters for **Whitelist Reason**, **From Expiration Date**, **Through Expiration Date**, and **Data Source**. Note, you may make more than one selection in the dropdown menus containing selectable boxes.
- After selecting a filter, the match results will automatically update with the applied filter(s).

Reason [] From Expiration Date [] Through Expiration Date [] Data Source []

CSV [] Export All []

You can extend expiration dates up to 03/07/2021 (90 days from today's date).

| Name | SSN/EIN/TIN | DUNS | Data Source | Reason | Expiration Date | Details |
|------|-------------|------|-------------|--------|-----------------|---------|
|------|-------------|------|-------------|--------|-----------------|---------|

Export Matches

- Below the filters, you can select the file type to export by clicking on the dropdown menu. Click **[Export All]** to download all the matches in the selected format.

Reason [] From Expiration Date []

CSV [] Export All []

You can extend expiration dates up to 03/07/2021 (90 days from today's date).

| Name | SSN/EIN/TIN | DUNS | Data Source | Reason |
|---------------|-------------|-----------|-------------|----------------|
| CHARLTON HOAG | 896903219 | 987654321 | DMF | False Positive |

Match Results

- To Whitelist a match result, select a Reason for the Whitelist from the dropdown menu.
- Select the **Expiration Date** of the Whitelist (there is a maximum of 90 days from the date you Whitelist).
- Click **[Apply]** and a confirmation box will appear at the bottom of the screen. Click **[Cancel]** if you don't want to apply changes.

| | | | | | | | | |
|---------------------|-----------|-----------|----------|-------------------------------|------------|--------|-------|------|
| HARRIS BENJAMIN | 423781254 | 123456789 | DOD | Business Reason To Whitell... | 10/29/2020 | Cancel | Apply | Save |
| ALTMAN BRUCE | 896903224 | | DOD | No Longer Whitelisted | 10/28/2020 | Cancel | Apply | Save |
| BLAKE BURGESS | 896903187 | 123456789 | DOS | Business Reason To Whitelist | | Cancel | Apply | Save |
| BRUCE ALTMAN | 896903224 | | AIS-OBIT | False Positive | | Cancel | Apply | Save |
| ADRIENNE JOHNSON | 896903217 | 123456789 | DMF | No Longer Whitelisted | | Cancel | Apply | Save |
| BILL FROST | 896903180 | 123456789 | DOS | No Longer Whitelisted | | Cancel | Apply | Save |
| ROBERT TREVEILER | | | | No Longer Whitelisted | 10/16/2020 | Cancel | Apply | Save |
| ADRIENNE JOHNSON | | | | No Longer Whitelisted | 10/16/2020 | Cancel | Apply | Save |

Whitelist Successful

SENSITIVE BUT UNCLASSIFIED

Release Enhancements (cont.)

Show and Save/Print Detail

- Click **[Show]** to view details of the match. This includes who applied the most recent Whitelist changes and the date/time the changes were applied. In the **Whitelist History** box, all of the previous Whitelist Reasons, Expiration Dates, Applied By, and the Applied Date/Time information is displayed.
- To save or print the individual Whitelist match details, click **[Save/Print Detail]** and a new browser window will open. Use the online PDF menu to download.

| REED CAMILA | 423781295 | 123456789 | DOD | Business Reason To White... | Apply | Save/Print Detail | Show | | | | | | | | | | | | | | | | |
|---|-----------------|------------|---------------------|-----------------------------|-------|-------------------|------|--------|-----------------|------------|-------------------|-----------------------|------------|----------|---------------------|----------------|------------|----------|---------------------|------------------------------|------------|----------|---------------------|
| HARRIS BENJAMIN | 423781254 | 123456789 | DOD | Business Reason To White... | Apply | Save/Print Detail | Show | | | | | | | | | | | | | | | | |
| ALTMAN BRUCE | 896903224 | | DOD | Business Reason To White... | Apply | Save/Print Detail | Hide | | | | | | | | | | | | | | | | |
| <p>Applied By: QAFADJ01 Applied Date/Time: 10/28/2020 11:06 AM</p> <p>Whitelist History</p> <table border="1"> <thead> <tr> <th>Reason</th> <th>Expiration Date</th> <th>Applied By</th> <th>Applied Date/Time</th> </tr> </thead> <tbody> <tr> <td>No Longer Whitelisted</td> <td>10/28/2020</td> <td>QAFADJ01</td> <td>10/28/2020 11:06 AM</td> </tr> <tr> <td>False Positive</td> <td>10/24/2020</td> <td>QAFADJ01</td> <td>09/24/2020 10:12 AM</td> </tr> <tr> <td>Business Reason To Whitelist</td> <td>10/24/2020</td> <td>QAFADJ01</td> <td>09/24/2020 10:03 AM</td> </tr> </tbody> </table> | | | | | | | | Reason | Expiration Date | Applied By | Applied Date/Time | No Longer Whitelisted | 10/28/2020 | QAFADJ01 | 10/28/2020 11:06 AM | False Positive | 10/24/2020 | QAFADJ01 | 09/24/2020 10:12 AM | Business Reason To Whitelist | 10/24/2020 | QAFADJ01 | 09/24/2020 10:03 AM |
| Reason | Expiration Date | Applied By | Applied Date/Time | | | | | | | | | | | | | | | | | | | | |
| No Longer Whitelisted | 10/28/2020 | QAFADJ01 | 10/28/2020 11:06 AM | | | | | | | | | | | | | | | | | | | | |
| False Positive | 10/24/2020 | QAFADJ01 | 09/24/2020 10:12 AM | | | | | | | | | | | | | | | | | | | | |
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| BRUCE ALTMAN | 896903224 | | AIS-OBIT | No Longer Whitelisted | Apply | Save/Print Detail | Show | | | | | | | | | | | | | | | | |

11/20/2020

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ALTMAN BRUCE

SSN/EIN/TIN 896903224

DUNS -
 Data Source DOD
 Whitelist Reason NO LONGER WHITELISTED
 Expiration Date 10/28/2020

Whitelist Historical Details

| Reason | Expiration Date | Applied By | Applied Date/Time |
|------------------------------|-----------------|------------|---------------------|
| NO LONGER WHITELISTED | 10/28/2020 | QAFADJ01 | 10/28/2020 11:06 AM |
| FALSE POSITIVE | 10/24/2020 | QAFADJ01 | 09/24/2020 10:12 AM |
| BUSINESS REASON TO WHITELIST | 10/24/2020 | QAFADJ01 | 09/24/2020 10:03 AM |