



Applicant Click-to-Sign Instructions

Click-to-Sign (CTS) instructions for signing the Certification (CER), Fair Credit Release (FCR), General Release (REL), and Medical Release (MEL) signature pages digitally within e-QIP.

Federal applicants, military, employees and contractors who use the electronic Questionnaires for Investigations Processing (e-QIP) to fill out their Standard Form have the ability to digitally sign their Standard Form Certification page, Fair Credit Release, General Release and Medical Release in e-QIP.

After filling out your Standard Form and when you are ready to certify and send your investigative information to your sponsoring agency...

1. Check the **“Yes”** block.
2. Click the **“Begin Request Certification Process”** button.
3. A pop up will appear alerting you that document generation may take 20 to 30 seconds. Click the **“OK”** button and wait until the next screen appears.

34/34
Sections Complete

Select Investigation Request	
Welcome	✓
Form Completion Instructions	✓
Statement of Understanding	✓
Sections 1-4 - Identifying Information	✓
Section 5 - Other Names Used	✓

If you reviewed the data you provided for accuracy and are prepared to submit your completed Investigation Request, click the 'Begin Request Certification Process' button, which will generate an official submittable copy of your Investigation Request, otherwise, use the Navigation menu to return to the appropriate sections to make changes.

I have read the instructions above and I am prepared to begin the process of certifying this investigation request.

Yes

No

Begin Request Certification Process

e-qiptest.opm.gov says:

The document generation process may take 30-60 seconds to complete. Remember to follow the instructions on the next screen.

OK

4. Click **“Yes”** to agree to sign your form and releases digitally, then click **“Continue”**.

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 e-QIP

Electronic Signature Forms
Click-to-Sign Opt-in Question

Some of the signature forms required to complete the processing of your request are available in an online electronic Click-to-Sign format. Utilizing these forms will allow for more efficient processing of your request.

Do you agree to utilize the Click-to-Sign functionality on all relevant forms?

5. Enter your e-QIP password to view your Certification Page for signature, then click **“Continue”**.

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 e-QIP

Electronic Signature Forms
Re-Authenticate

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

Password

6. To review the data you provided for accuracy, click the link **“Display Archival Copy”**. When you click on the link a copy of the information you entered into e-QIP will open in a new browser window or tab. This version is for review, you will be presented with a final copy for your records later in this process.

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 e-QIP

Electronic Signature Forms
Click-to-Sign Form

NOTICE: AFTER REVIEWING THE CLICK-TO-SIGN FORM AND CLICKING THE 'CLICK HERE TO SIGN' BUTTON BELOW, YOU WILL NO LONGER BE ABLE TO MAKE CHANGES TO THE DATA YOU HAVE SUBMITTED.

Click the link below to display the archival copy for final review. If you reviewed the data you provided for accuracy and are prepared to submit your completed Investigation Request, review the Click-To-Sign form below and click the 'Click Here to Sign' button. Otherwise to make changes click the 'Edit Your Data' button.

Electronic Questionnaires for Investigations Processing (e-QIP)
Investigation Request # 1335980 for Applicant SSN

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Signature Forms

- a. If you find that you need to edit your information, you must go to the prior window or tab (you may close the tab or window your archival copy is being presented in) and click the **“Edit Your Data”** button, navigate to the correct section of the form and update the information. If this happens, begin with these instructions at step 1 again. If you determine your information is ready to submit to your sponsoring agency, go to step 7 of these instructions

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 **e-QIP** **Electronic Signature Forms**
Click-to-Sign Form

NOTICE: AFTER REVIEWING THE CLICK-TO-SIGN FORM AND CLICKING THE 'CLICK HERE TO SIGN' BUTTON BELOW, YOU WILL NO LONGER BE ABLE TO MAKE CHANGES TO THE DATA YOU HAVE SUBMITTED.

Click the link below to display the archival copy for final review. If you reviewed the data you provided for accuracy and are prepared to submit your completed Investigation Request, review the Click-To-Sign form below and click the 'Click Here to Sign' button. Otherwise to make changes click the 'Edit Your Data' button.

[Display Archival Copy](#) [Edit Your Data](#)

Electronic Questionnaires for Investigations Processing (e-QIP)
Investigation Request # 1335980 for Applicant SSN

Page 1 of 1
Signature Forms

7. When you are ready to certify your information, click the button **“Click Here to Sign”**.

Certification

My statements on this form, and on any attachments to it, are true, complete, and correct to the best of my knowledge and belief and are made in good faith. I further affirm that, to the best of my knowledge, I have not included any classified information herein. I have carefully read the foregoing instructions to complete this form. I understand that a knowing and willful false statement on this form can be punished by fine or imprisonment or both (18 U.S.C. 1001). I understand that intentionally withholding, misrepresenting, falsifying, or including classified information may have a negative effect on my security clearance, employment prospects, or job status, up to and including denial or revocation of my security clearance, or my removal and debarment from Federal service.

Signature *(Sign in ink)* Date *(mm/dd/yyyy)*

e-QIP Version 3.26
e-QIP Investigation Request # 1335980

PRIVACY ACT INFORMATION
e-QIP Document Type CER

[Back](#) [Click Here to Sign](#)

8. If you would like a copy of this digitally signed Certification Page click the **“Download Click-to-Sign Receipt”** link on the page. You will be presented with a copy of your digitally signed Certification page in another browser window or tab. This is the only opportunity you will have to save or print this copy. If you do not want a copy of your digitally signed Certification, go to step 9.
9. To continue signing your documents click the **“Continue”** button. If you have viewed your digital signature page you may need to go to the prior screen that should still be open within your browser in another window or tab.

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e-QIP Electronic Signature Forms
Print Click-to-Sign Form

[Return to Menu](#) | [Logout](#)

Print and/or save the Click-to-Sign receipt for this signature form by clicking on the link below. Click 'Continue' when finished.

[Download CER Click-to-Sign Receipt](#)

Continue

10. Enter your e-QIP password again to view your Fair Credit Reporting Release for signature, then click **“Continue”**.

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e-QIP Electronic Signature Forms
Re-Authenticate

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

Password

Continue

11. You will be presented with your Fair Credit Reporting Release. When you are ready to sign, click the button **“Click Here to Sign”**.

Print name abc abc abc	Social Security Number
Signature (Sign in ink)	Date (mm/dd/yyyy)



e-QIP Version 3.26
e-QIP Investigation Request # 1335980

e-QIP Document Type FCR

Click Here to Sign

12. If you would like a copy of this digitally signed Fair Credit Reporting Release, click the **“Download Click-to-Sign Receipt”** link on the page. You will be presented with a copy of your digitally signed release in another browser window or tab. This is the only opportunity you will have to save or print this copy. If you do not want a copy of your digitally signed Fair Credit Reporting Release, go to step 13.
13. To continue signing your documents click the **“Continue”** button. If you have viewed your digitally signed release you may need to go to the prior screen that should still be open within your browser in another window or tab.

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 **e-QIP** **Electronic Signature Forms**
Print Click-to-Sign Form [Return to Menu](#) | [Logout](#)

Print and/or save the Click-to-Sign receipt for this signature form by clicking on the link below. Click 'Continue' when finished.

[Download CER Click-to-Sign Receipt](#)

Continue

14. Enter your e-QIP password again to view your General Release for signature, then click **“Continue”**.

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 **e-QIP** **Electronic Signature Forms**
Re-Authenticate [Return to Menu](#) | [Logout](#)

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

Password

Continue

15. You will be presented with your General Release. When you are ready to sign, click the button **“Click Here to Sign”**.

Signature (Sign in ink)		Full name (Type or print legibly) abc abc abc		Date signed (mm/dd/yyyy)	
Other names used asdf asdf fasdf			Date of birth 12/01/1980		Social Security Number
Current street address 123 boyers	Apt.#	City (Country) boyers	State PA	ZIP Code 16018	Telephone number 1111111111

e-QIP Version 3.26
e-QIP Investigation Request # 1335980 **QIP Document Type REL**

Click Here to Sign

16. If you would like a copy of this digitally signed General Release, click the **“Download Click-to-Sign Receipt”** link on the page. You will be presented with a copy of your digitally signed release in another browser window or tab. This is the only opportunity you will have to save or print this copy. If you do not want a copy of your digitally signed General Release, go to step 17.
17. To continue the signature process, click the **“Continue”** button. If you have viewed your digitally signed release you may need to go to the prior screen that should still be open within your browser in another window or tab.

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 **e-QIP** **Electronic Signature Forms**
Print Click-to-Sign Form [Return to Menu](#) | [Logout](#)

Print and/or save the Click-to-Sign receipt for this signature form by clicking on the link below. Click 'Continue' when finished.

[Download CER Click-to-Sign Receipt](#)

Continue

18. You may be asked to sign a Medical Release. If you have questions about this you must ask your sponsoring agency. Not signing the Medical Release when it is required can delay the processing of your investigation. Enter your e-QIP password again to view your Medical Release for signature, then click **“Continue”**. If you are not presented with another field to enter your password, go to step 23.

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 **e-QIP** **Electronic Signature Forms**
Re-Authenticate [Return to Menu](#) | [Logout](#)

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

Password

Continue

19. You will be presented with your Medical Release. When you are ready to sign, click the button **“Click Here to Sign”**.

(Note: You can opt out of signing the medical release by using the “Continue Without Signing” button at the bottom of the page. If it is required for the processing of your investigation, your agency will not be able to process the investigation until they obtain the medical release from you.)

Signature (Sign in ink)		Full name (Type or print legibly) abc abc abc		Date signed (mm/dd/yyyy)	
Other names used aabc adef fghde				Social Security Number	
Current street address 1234 boynon		Apt.# 5c	ZIP Code 14018	Telephone number 1111111111	
For Use By Practitioner(s) Only					
Does the person under investigation have a condition that could impair his or her judgment, reliability, or trustworthiness? YES NO If so, describe the nature of the condition and the extent and duration of the condition.					
What is the prognosis?					
Dates of treatment					
Signature (Sign in ink)		Practitioner name		Date signed (mm/dd/yyyy)	

e-QIP Version 3.26
e-QIP Investigation Request # 1335980

e-QIP Document Type MEL

Click Here to Sign **Continue Without Signing**

20. If you would like a copy of this digitally signed Medical Release, click the **“Download Click-to-Sign Receipt”** link on the page. You will be presented with a copy of your digitally signed release in another browser window or tab. This is the only opportunity you will have to save or print this copy. If you do not want a copy of your digitally signed Medical Release, go to step 21.
21. To continue the signature process, click the **“Continue”** button. If you have viewed your digitally signed release you may need to go to the prior screen that should still be open within your browser in another window or tab.

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e-QIP

Electronic Signature Forms Print Click-to-Sign Form

Print and/or save the Click-to-Sign receipt for this signature form by clicking on the link below. Click 'Continue' when finished.

[Download CER Click-to-Sign Receipt](#)

[Continue](#)

22. Once you have signed all applicable documents, you will receive instructions for releasing this information to your sponsoring agency. You must complete this process in order for your agency to process your investigation. Click **“Next”**.

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e-QIP

Release Investigation Request Instructions

Step 1 of 4
Instruction for Signature Pages, Attachments, and Archival Copy

NOT COMPLETING THE FOLLOWING TASKS WILL DELAY PROCESSING OF YOUR INVESTIGATION REQUEST

- Carefully follow the instructions provided on the following screens in the order displayed.
- If you are unable to complete the following steps at this time (e.g. if you do not have access to a printer at your computer), you **MUST** return to e-QIP at a later time to complete the remaining steps.
- Contact your agency if you need assistance with printing, uploading, and/or faxing these documents.

[Next](#)

23. The screen below presents you with a link to view, save and/or print an archival copy of your investigative information. **It is strongly recommended that you save or print a version of your submitted information for your own records.** Click the **“Display Archival Copy”** link in order to view, save and/or print your archival copy. If you view your archival copy you may need to navigate back to this screen that should still be open within your browser in another window or tab.
24. Click **“Next”** to view a summary of all the signature pages that are now packaged with your investigative data and ready to be released to your sponsoring agency.



Step 2 of 4

Download Archival Copy

You have certified to the completeness and accuracy of the information in your Investigation Request, e-QIP has generated a printable archival copy of the information you provided. You are strongly advised to print a copy for your records. Properly dispose of any working copies that you may have printed while editing and reviewing your information, as those are not considered official. You will need Adobe Acrobat Reader or Adobe Acrobat to view the archival copy.

Click the link below to display the archival copy, and then print a copy to retain for your records.

[Display Archival Copy](#)

[Back](#)

[Next](#)

25. The four signature pages you just digitally signed are automatically attached to the request and you will see them listed on this page.
- If you do not have any additional attachments to attach to this request or have finished adding all your desired attachments to the request, select the **“No”** radial button, click **“Next”** and proceed to step 27.
 - If you have additional attachments to add to this request, select the **“Yes”** button, click **“Next”** and proceed to step 26.



Step 3 of 4 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.



Total Attachments: 4

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

☐ Yes ☐ No

26. If you are going to provide additional attachments you must choose how you will provide your attachment/document to your sponsoring agency from one of the three options:

The screenshot shows the 'e-QIP' interface for 'Release Investigation Request Attachment Method'. It is 'Step 3 of 4' titled 'Add Attachment: Choose Method'. The instructions state: 'Use any of the following methods to provide attachments for your investigation Request:'. Three options are listed: 'Upload File' (upload directly to e-QIP), 'Direct Fax' (automated fax solution), and 'Expected' (Standard Fax, Mail, or Other). Below the list, it asks to 'Specify method to be used to provide your attachment?' with three buttons: 'Upload File', 'Direct Fax', and 'Expected'. At the bottom are 'Back' and 'Next' buttons.

- a. To upload an attachment/document from your computer choose the **“Upload File”** option then click **“Next”**. A screen will appear with directions on uploading files from your computer. When done uploading attachments, click the **“Return to Attachments Summary”** button.

Uploaded file Specification

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.

NOTE: Certification, General Release and Medical Release forms must be attached separately as single page documents. Items such as a resume or OF 612 can be uploaded as multi-page documents.

Uploaded Attachment (TIFF, PDF, or PNG files only)

[Browse...](#) No file selected.

Description

[Upload Chosen File](#)

[DSREL General Release](#)
e-QIP_Request_1335980_REL_Receipt.pdf

[DSREL Medical Release](#)
e-QIP_Request_1335980_MEL_Receipt.pdf

Total Attachments: 4

[Return to Attachments Summary](#)

- b. To automatically attach a fax to this e-QIP package choose the **“Direct Fax”** option then click **“Next”**. A screen will appear with instructions for creating and printing the required fax cover sheet. You will have to create and print a fax coversheet from this screen that will need to be faxed with your attachment before you release this e-QIP package to your sponsoring agency. When done faxing the attachment, click the **“Return to Attachments Summary”** button.

The screenshot shows the 'e-QIP' interface for 'Add Fax Attachment'. It is 'Step 3 of 4' titled 'Add Fax Attachment'. Under 'Instructions', it lists two steps: 1. 'Create Cover Sheet for Fax Attachment' (instructions on providing 'Attached Pages' and generating a cover sheet) and 2. 'Fax the document to e-QIP:' (instructions on placing the cover sheet and document on the fax machine). Below the instructions, it states: 'If successful, the fax will be attached to this Investigation Request within 10 minutes. Confirm that the fax was correctly attached and is visible on the Summary of Attachments screen. To return to the Summary of Attachments screen click the "Return to Attachment Summary" button.' It also includes a note: 'If there are problems with the faxed attachment not showing up in on the Summary of Attachments screen and your fax machine indicates that the fax was successfully sent to the e-QIP fax server, contact office requesting your investigation.' A **NOTE:** states: 'This method electronically associates your fax to this request.' Below this are two input fields: 'Number of Attached Pages (excluding cover sheet)' with a value of '0' and 'Sender's Contact #'. At the bottom are two buttons: 'Return to Attachments Summary' and 'Create Fax Cover Sheet'.

- c. If directly sending the attachment to your sponsoring agency (mail, hand delivery, faxing your sponsoring agency directly, etc.) choose the **“Expected”** radial button then click **“Next”**. A screen will appear requesting a description, number of pages and method of transmission for this expected attachment. This will not attach anything to this request, but rather alerts your sponsoring agency to expect your attachment/document.

Step 3 of 4
Add Expected Attachment (Standard Fax, Mail or Other)

Add a non-uploaded attachment by providing the information below. This information will help your sponsoring agency know that you are sending additional attachments to be associated with your Investigation Request.

NOTE: Write your Social Security Number and the Request ID number (1335980) on the margin of each attachment you submit.

Name/Description

Number of Pages

Method of Transmission

☐ Faxed	☐ Mailed	☐ Other
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[Add Expected Attachment](#)

[Return to Attachments Summary](#)

27. Click the **“Release Request/ Transmit to Agency”** button.

28. Then click **“OK”** in the pop-up message.



Step 4 of 4
Release Request to Agency

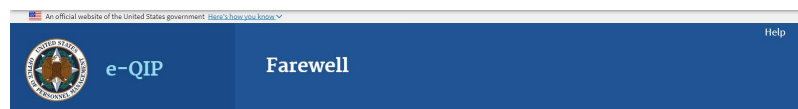
IMPORTANT: YOUR BACKGROUND INVESTIGATION CANNOT START UNTIL YOUR AGENCY RECEIVES ALL REQUIRED SIGNED SIGNATURE FORMS.

When you have completed the previous steps, you may release your Investigation Request for processing. Performing this step will electronically transmit your Investigation Request to the agency requesting your investigation, and you will no longer have online access to it for printing, review, or directly adding attachments.

After you complete the previous step, click this button to release and transmit your Investigation Request to the requesting agency.

[Back](#) [Release Request/Transmit to Agency](#)

29. Your investigation request has now been released to your sponsoring agency.



Thank You For Using the e-QIP System

Your Investigation Request has been released for processing. This completes the online portion of your submission. If you have not electronically attached all required signature forms, submit the signature forms that you printed to the office requesting your investigation.

For your privacy, close this window when you finish.