

Scheduling Manual

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000-001 Distribution List

Manual No.	Site	Manual Location
Electronic	DOS SharePoint	[REDACTED]
Backup	DOS Server	[REDACTED]

000-002 Revision Authority

Any changes made to the Scheduling Manual require approval from the Responsible Manager, Scheduling Unit Manager, or delegate.

000-998 Revision History

R040-28APR2022 Module 020-060, changed 1st and 2nd Cycle to 1st and 2nd Round; 040-015, specified that emails that require a response should be replied to within 2 business days and when replying, reply to ALL; 060-060, specified that any posts can utilize specific percentage; 080-070, clarified that applicants may not be grouped together in the applicant list; 080-090, specified if a case is canceled by Scheduled in Error, the case will be relocated to the Cancellations Tab; 080-092, added to Note, if a case is in Pending, you are not able to “search” the case; 100-020, in step 3 of chart, added text saying the WHA region is split into 3 sub-regions; 120-042A, added 12th Step to chart of procedures that says the total number of time slots per day may need to be adjusted depending on capacity needed per scheduling month; 120-044, step 9 added Note saying Please don’t regularly use (Exception Days) as this can cause issues with the templates in EAMS; 140-022A, added 8th step to chart of procedures for allocating posts in IVIS; 140-040, has been retitled to Pre-Scheduling and existing procedures have been revised and steps 4 through 12 have been added to the procedural chart; 160-020, step 2 revised to say that case may need to be searched twice to schedule and in step 3 added that if there is a red box around the date, only click the calendar icon next to the date and re-select the date until red box disappears; 160-030, in step 5, added Scheduled in Error as a reason for the cancellation from the drop- down menu that appears as shown below and added note that you may need a different reason to completely remove a case from EAMS, depending on the situation of the case. 160-040, step 2, added to select a date that has no leftover slots or re-select the same calendar date or change to a different date and reselect correct date;

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160-060, revised steps 4 and 5 with links to specific procedure; 160-080, revised the Self-verification process to three things to verify for each case; 160-081, simplified the steps to obtain a list of applicants scheduled in EAMs for self-verification; 160-082, removed section on Duplicates; 160-083, removed section Family's Scheduled Together; 160-084, removed section on Cross-Referenced Cases Scheduled Together; 160-085, removed section on Active Action Codes (IVIS); 160-086 (Packet 4 Reports/NUMS (IVIS) was renumbered to 160-082; 160-087 (EP Scheduled Cases Report (IVIS) was renumbered to 160-083 and a new instruction appears in the first paragraph and updated step 5; 160-088, removed Fraud Cases Scheduled (PIVOT); 160-100A, updated procedures to calculate the total number of immediate Relative and SIV applicants in the backlog and updated step 6 in the procedure to calculate the total Preference applicants in the backlog; also removed step 8 from the procedures, and finally said to have a CSA or Supervisor review the scheduling review before it is sent; 160-120, removed step 8; Module 170 Peer Verification was removed from the manual. Changes authorized by:

- DDC Request from [PII] and [PII] (SCH) created 25APR2022
- Client directives documented in CR837, *SCHED, Reducing and Automating Verification*

R039-01APR2022

Module 000-001, Updated Manual locations; 020-010, Overview updated; 020-020, visa category lists removed and replaced with a reference to the Telephone Inquiry Reference Handbook; 020-030, Form reference removed and replaced with reference to Post Code Specifics Manual; 020-040, Scheduling workflow updated; 020-050, section removed; 020-060, Description of Final Action Dates updated; 020-080 through 084, new section added for Scheduling Appointment Process flows; Module 040 Retitled from Communication to Getting Started; 040-010, Retitled from Overview to Mailbox Set-up and updated; 040-015 Retitled from Email Distribution to General Email Procedure and updated; 040-020, Email Template instructions updated with reference to Scheduling Email Templates Manual; 040-030, Retitled from Email Signature and Font to Setting up your Email Signature, mailbox updated from nvcappointment to nvcpost and Signature process steps updated; 040-040, Retitled from General Procedure for Processing an Email to Network Drives and process steps added; 040-060, Retitled from Post Follow-up Emails to EAMS Registration and new process steps added; 040-070 renumbered to 040-080, retitled from Out of Office Responses to Logging into EAMS and new process steps added; 060-010, Overview updated; 060-020, Post Scheduling Access instructions updated; 060-030, Retitled from Part 1 Info Tab to Profile Tab and chart updated; 060-040, Retitled from SIV Scheduled to Month (Calendar) Tab, and chart updated; 060-050,

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section removed; 060-060, Retitle from VPS Scheduling Information to Scheduling Guidelines for Post and new instructions added; 060-070 through 080 sections removed; Module 080 Retitled from IVIS Scheduling Calendar to EAMS and completely rewritten; Module 100 Retitle from New Scheduling Cycle to Capacity Requests and completely rewritten; Module 120 Retitled from Cutoff Dates to Calendar Creation and completely rewritten; 140-010, Overview updated; 140-020, Retitled from Pre-Visa Allocation Checklist to Allocations and process updated; 140-022 section added for IVIS Allocations; 140-024, section added for PIVOT Allocations; 140-030 Retitled from Allocate Visas to Case Push into EAMS, and process updated; 140-040, Retitled from After Allocation to Verifying if Cases are in EAMS, and process updated; 160-005, Overview updated; 160-020, new section created for Manual Scheduling; 160-030, new section created for Manual cancellation; 160-040, Troubleshooting System Error section renumbered from 160-080 and process updated; 160-090 After the Live Run is Complete section removed; 160-060 Scheduling Electronic Cases Renumbered from 160-100 and process updated; 160-070, new section created for Scheduling SIV cases; 160-080, new section added for Self-Verification; 160-081, new section added for EAMS Exported Applicant List; 160-082, new section added for Duplicates; 160-083, new section added for Family's Scheduled Together; 160-084, New section added for Cross-Referenced Cases Scheduled Together; 160-085, new section added for Active Action Codes (IVIS); 160-086, new section added for Packet 4 Reports/NUMS (IVIS); 160-087, new section added for EP Scheduled Cases Report (IVIS); 160-088, new section added for Fraud Cases Scheduled (PIVOT); 160-100, new section added for Scheduling/Backlog Email; 160-120, new section added for Regional Spreadsheet update; 160-110 and 120, sections removed; Module 170 Retitled from Specialty Scheduling to Peer Verification and completely rewritten; 180-010, Overview updated; 180-020, Chart, new step 8 added and following steps renumbered; 180-040, section removed; 180-050, section renumbered to 040; Module 220 Interview Letters, module removed; Module 240 Scheduling Reports, module removed; Module 300 Miscellaneous, Scheduling Items, module removed; Module 340 Scheduling Verification, module removed; Module 400, CI's Expedite Tracking SharePoint Site, module removed; Module 999 External References, module removed. Changes authorized by:

- DDC Request from [PII] and [PII] (SCH) created 24MAR2022
- Client directives documented in CR681, *SCHED Manual Consolidation*

R038-30DEC2021

Module 400, created this new module to outline the process of using the CI Expedite Tracking SharePoint site. Changes authorized by:

- DDC Request from [PII] and [PII] (SCH) created 18NOV2021

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- Client directives documented in CR764, *CI Expedite Tracking SharePoint site*

R037-24MAR2020 Modules 020, 060, 080, 100, 140, 160, 170, 240, 300, replaced the term “Non-preference” with “Immediate Relative.” Module 240, replaced the term “NP” with “IR.” Changes authorized by:

- DDC Request from [PII] and [PII] (SCH) created 11MAR2020
- Client directives documented in CR303, NVC Nomenclature NP to IR

R036-31JAN2020 Module 240-110, removed reference to now deactivated action code **AJ** from step 10 of the chart. Change authorized by:

- Internal DDC Request from [PII] and [PII] (SCH), created 15JAN2020.
- Client directives documented in CR248.

R035-25SEP2019 Module 170-052, removed references to GZO in the step chart. Change authorized by:

- Internal DDC Request from [PII] and [PII] (SCH), created 19SEP2019.
- Client directives documented in CO 701.

R034-29AUG2019 Removed section 240-185 *Post Interview Contact List* from manual. Change authorized by:

- Internal DDC Request from [PII] and [PII] (DR), created 21AUG2021.
- Client directives documented in CR 123.

R033-02MAY2019 Module 320 Syrian Flight Verification Program, removed entire Module. The Syrian Flight Verification Program was published as its own stand-alone manual. (MAN-WC-R000 Syrian Flight Verification Program Manual). Changes authorized by:

- Internal DDC Request from [PII] and [PII] (DR), created 31MAY2018.
- Client directives documented in CO-288.

R032-21AUG2018 080-025, added Preference Scheduling settings. Changes authorized by:

- Internal DDC Request from [PII] and [PII] (DR-Scheduling) created 13AUG2018.
- Client directives documented in CO-512.

R031-01JUL2018 000-001, updated file name; 000-998, removed several pages of revision history; 240-010, updated office to whom the workbook is sent. Changes authorized by:

- Client directives documented in CO-470.

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R030 01AUG2017 Section 170-020, EP Pull list note removed; 170-030, replaced SharePoint reference to eDP. Changes authorized by:

- Internal DDC Request from [PII] and [PII] (DR) created 25JUL2017
- Client Directives documented in RFC-205.

***For previous revision history specifics, please contact the Technical Writing Team by sending an email with your request to [REDACTED] ***

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Introduction

020-010 Overview

The National Visa Center (NVC) typically performs scheduling each month for IV posts worldwide. The receipt of the Preliminary Action Dates and the Final Action Dates received from the Visa Office (VO) dictates when scheduling can begin.

Before appointments are scheduled for the coming month, the Scheduling team reaches out to each post two months in advance, and requests updated preferred scheduling settings, days/times, and capacities for that coming month. When those calendars are received, the team updates the information into Post Instructions and creates new calendars in EAMS.

After scheduling has been completed for the month:

- The Scheduling team contacts each post to notify them of any changes/modifications made to their scheduling calendar, as well as totals of how many applicants were scheduled. Also, if there are any backlogged applicants that didn't receive an appointment due to limited capacity.
- IVIS cases receive a Packet 4 generation (interview letters) by the NVC Packet 4 Team and are sent to all case parties via email. A physical letter will be sent if there is no email on file.
- PIVOT systematically sends interview letters to all case parties via email before the cases are transferred to post.

The last step is shipping/transferring cases to post:

- IVIS cases are physically mailed to post by the NVC Mail-out team and data-files are sent from eDP.
- If cases are processed electronically (EP), the files are uploaded into eDP and the data-files are sent from eDP.
- PIVOT cases are automatically transferred to post within 3 business days from the day they received an appointment date.

Introduction

020-020 Visa Categories Scheduled by NVC

NVC is responsible for scheduling both **Preference** (Family-sponsored and Employment cases) and **Immediate-Relative** (Immediate relative and Special Immigration Visa cases) applicants:

A complete list of visa categories can be found in the [Telephone Inquiry Reference Handbook](#).

020-030 Posts We Do Not Schedule

The NVC does not schedule every post around the world. There are posts that have closed permanently, posts taking appointments but are not scheduled by NVC, or ones that are open but are currently not scheduling IV appointments. This information can be verified in the [Post Code – Specifics manual](#).

If there are any questions, please check with an Operations Supervisor or Unit Manager.

020-040 Scheduling Workflow

The standard scheduling process consists of the following 11 steps:

Step	Action
1	Run Report 20.
2	Receive Final Action Dates from Visa Office per 020-060 .
3	Visa Allocation per 140 and pushing into EAMS per 140-030 .
4	Perform Scheduling per 160 .
5	Self-Verification per 160-080 .
6	Peer-Verification per 170 and send NUMS per 170-040 .
7	Generate Post Supplements per 180-020 . <ul style="list-style-type: none">• Note: This step is for GUZ EP cases only.
8	Send scheduling/backlog emails to Post once verified.
9	Request Capacity from Posts per 100-020 .
10	Update EAMS based on Posts' Instructions per 120-040 .
11	Un-report and Un-allocate (Pre-Report 20).

Introduction

020-060 Final Action Dates

Once per month, the Visa Office (VO) provides NVC with final **action dates**. These dates indicate whether a visa is available to schedule Preference cases. The timing of when we scheduled is referenced as **(1st Round)** and **(2nd Round)**.

- **Preference:** Family-based and Employment-based cases have only a limited number of visas available making them numerically limited. VO allocates visas to applicants from different countries based on their visa category, priority date, and FSC (Foreign State Chargeability - determined by Country of Birth).
- **Immediate-Relative:** Immediate Relative cases and Returning Citizen categories are NOT numerically limited, making them always current, therefore always having a visa number available.

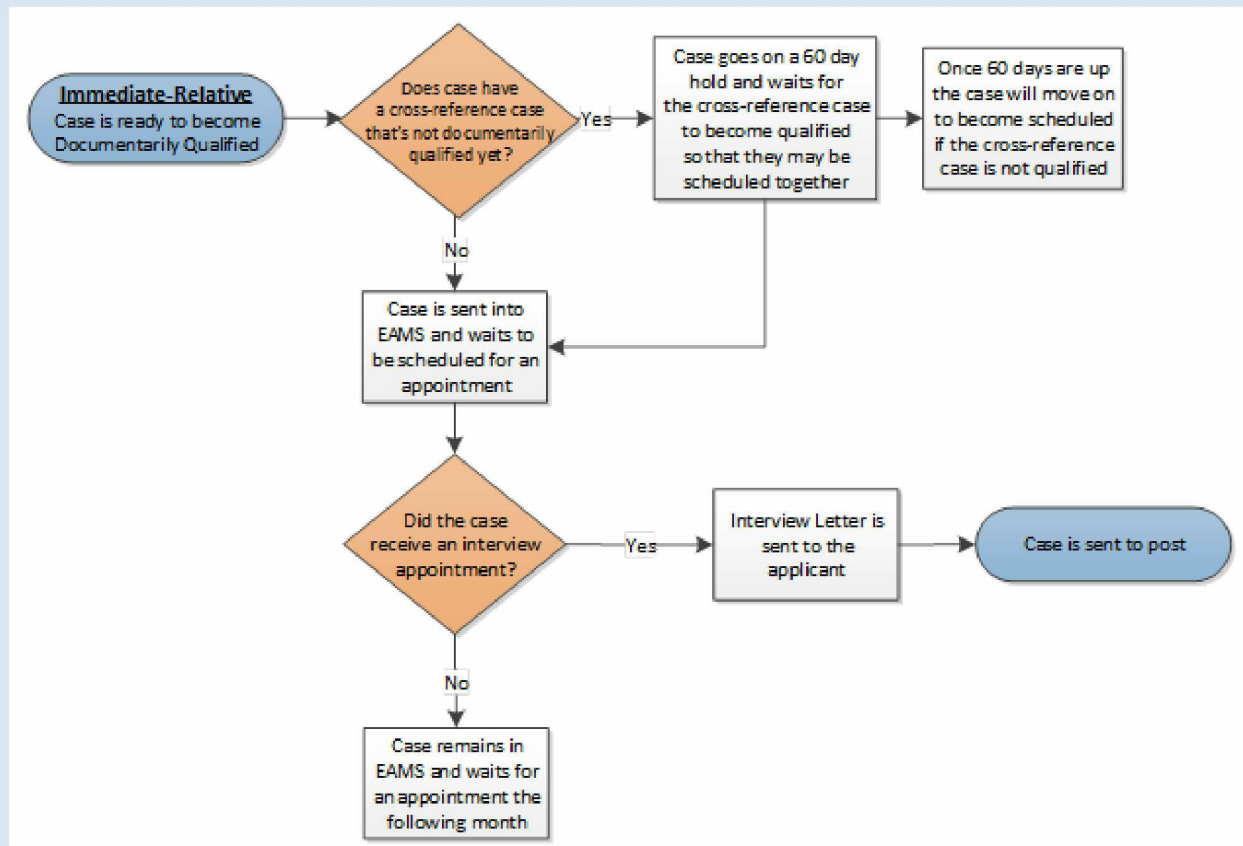
For a case to be deemed current by the final action date, the action date is compared with the visa category and priority date under the appropriate FSC for the principal applicant*. The priority dates must be PRIOR to the action dates.

**The FSC is initially derived from the principal applicant's country of birth. If the FSC derived from the principal applicant causes the case to be non-current and there is an accompanying derivative spouse, the system will check to see if using the derivative spouse's country of birth to derive FSC would cause the case to become current. If deriving the FSC from a derivative spouse is more favorable, the derivative spouse's county of birth will be used as the FSC.*

Introduction

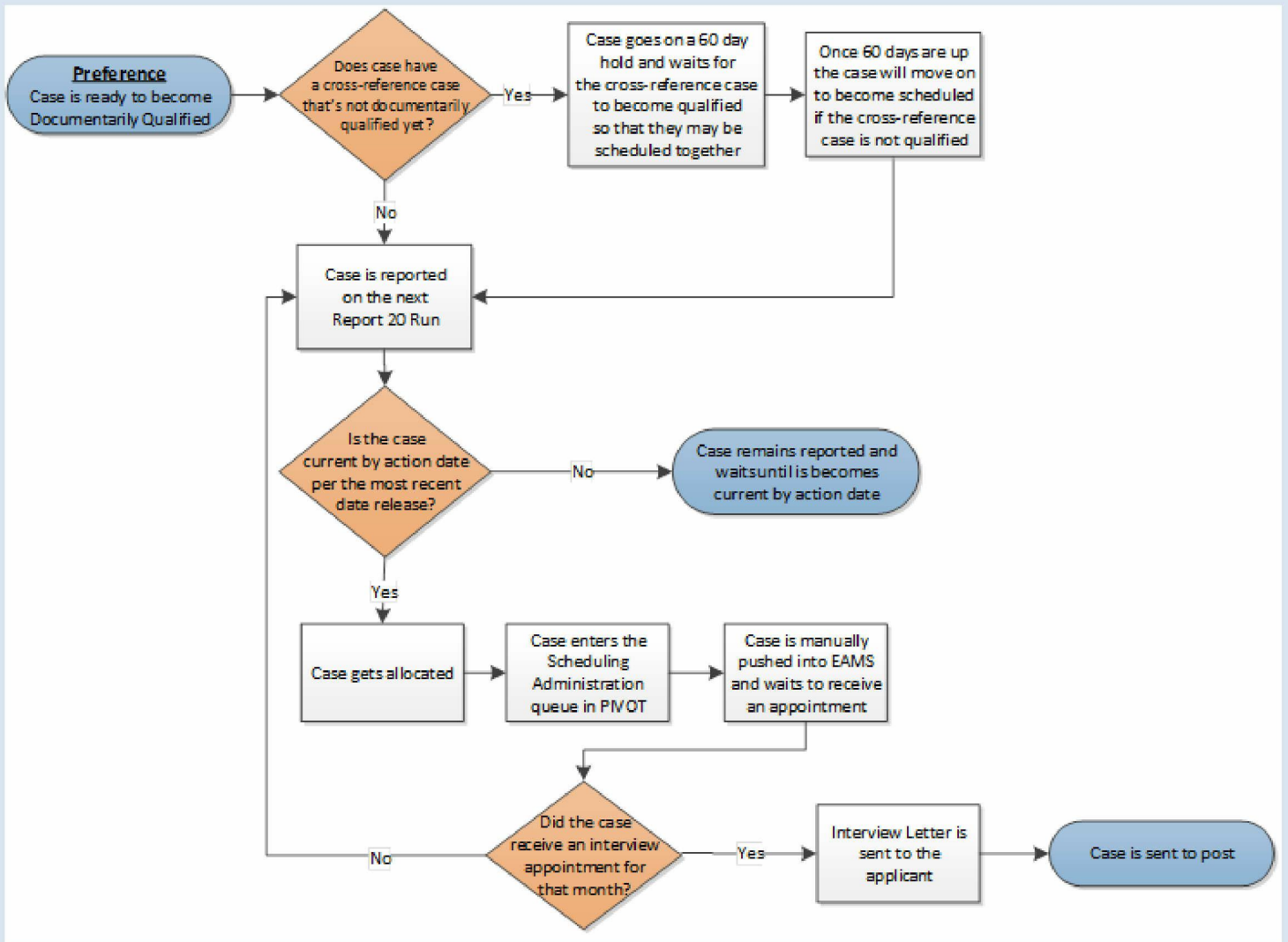
020-080 The Path of Scheduling Appointments

020-082 Path of Immediate-Relative Cases



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020-084 Path of Preference Cases



020-998 Revision History

The following manual revisions include changes to this module:

[R040-28APR2022](#) • [R039-01APR2022](#) • [R037-24MAR2020](#) • [R028-18JAN2017](#) • [R026-14NOV2016](#) • [R023-01AUG2016](#) • [R022-26MAY2016](#) • [R005 26FEB2014](#) • [R004 24JAN2014](#)

Getting Started

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040-010 Mailbox Set-up

All communications between post and/or internal contacts that are scheduling related must be conducted via email. Scheduling processors share an Outlook mailbox with the Post Liaisons.

To set up access to this mailbox:

Step	Action
1	Open Outlook .
2	Choose the File tab in the ribbon.
3	Choose Account Settings , then select Account Settings from the dropdown.
4	Select the Email tab.
5	Select New .
6	Type the shared email address: NVCPOST@state.gov .
7	Select Connect > Done .
8	Restart your Outlook .

Getting Started

040-015 General Email Procedure

All incoming emails related to scheduling are to be placed in the scheduling folder, then have a categorization tag placed on them, and finally placed into their designated Regional Folders for processing. Each Scheduler is assigned a colored categorization tag to indicate which emails they are responsible for. For post assignments, please reference the [Regional Spreadsheet](#). All emails that require a response should be replied to within two (2) business days if not sooner. When replying to remails, please Reply All.

Either an Operations Supervisor or any member of the Scheduling team may place their name tags on the incoming emails.

040-020 Email Templates

When drafting and responding to post, a prewritten email template must always be used. However, the use of email templates for internal communications are not always required

There will be instances when an email template may not be efficient enough or specific language is not available in the templates. In these circumstances, please escalate to a CSA or Operations Supervisor to draft a unique free-hand response.

The [Scheduling Email Templates Manual](#) contains the set of prewritten emails.

IMPORTANT:

If post sends an email with an attachment, you must include the original attachment when you respond.

Getting Started

040-030 Setting up your Email Signature

You must include a standard signature on all emails you send from the nvcpost@state.gov mailbox.

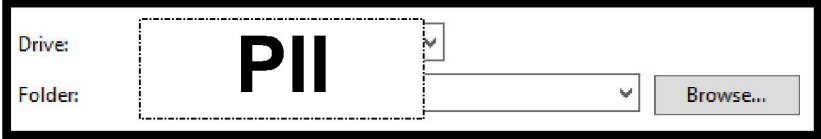


Step	Action
1	Open Outlook.
2	Click the "File" tab in the ribbon.
3	Click "Options."
4	Click the "Email" tab > Signatures.
5	Under the Signatures section, click "Signatures."
6	Select "New," enter <i>Scheduling</i> as the name and click "OK."
7	Choose More Settings > Advanced > Add
8	<p>Copy and paste the following into the text box:</p> <p>Regards,</p> <p>[ENTER NAME] Scheduling Department of State CA/VO/DO/NVC LDRM [Company Name] Contractor DOS - National Visa Center 32 Rochester Ave Portsmouth, NH 03801-2909 NVCPOST@state.gov</p> <p><i>This email is Sensitive but Unclassified based on the definitions provided in 12 FAM 540.</i></p> <p><i>Any information in this transmission pertaining to the issuance or refusal of visas or permits to enter the United States shall be considered confidential under Section 222(f) of the Immigration and Nationality Act (INA) [8 US C. Section 1202]. Access to and use of such information must be solely for the formulation, amendment, administration, or enforcement of the immigration, nationality, and other laws of the United States under INA 222(f) and as specified in FAM guidance. If you have received such information in error, do not review, retransmit, disclose, disseminate, use, or take any action in reliance upon this information, and contact the sender as soon as possible.</i></p>
7	Select NVCPOST@state.gov from the dropdown boxes for new messages and replies/forwards under the Choose default signature section. Choose OK > OK.

Getting Started

040-040 Network Drives

Scheduling utilizes shared folders on multiples Network Drives.

To set up access to a Network Drive:


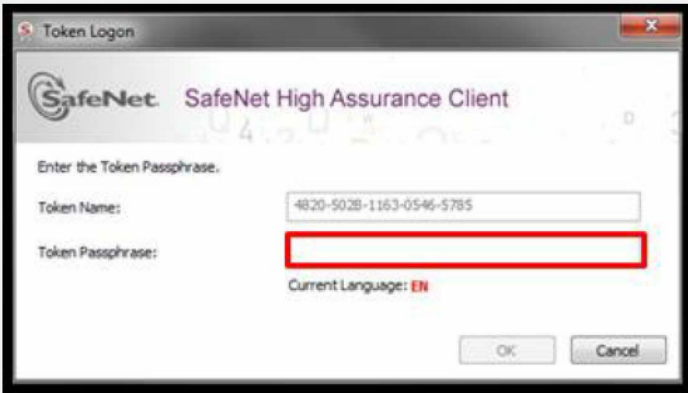
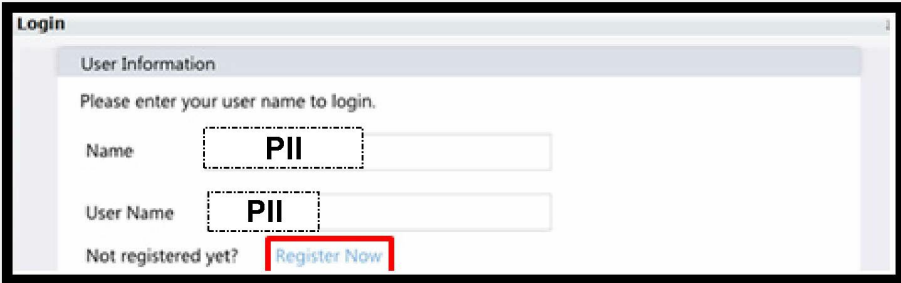
Step	Action
1	Open File Explorer .
2	Choose right click Network on the side ribbon.
3	Choose Account Settings , then select Account Settings from the dropdown.
4	Select Map Network Drive .
5	Select an available letter from the Drive dropdown:  The following drives are the most used in SCH: <ul style="list-style-type: none">•  Shares•  Shares
6	Choose Finish .
7	Your mapped Network Drives will be listed under This PC on File Explorer.
8	Choose OK > OK .
9	Choose Next > Finish > Close .

Getting Started

040-060 EAMS Registration

Before processing in EAMS for the first, a user must register and set-up an EAMS account.

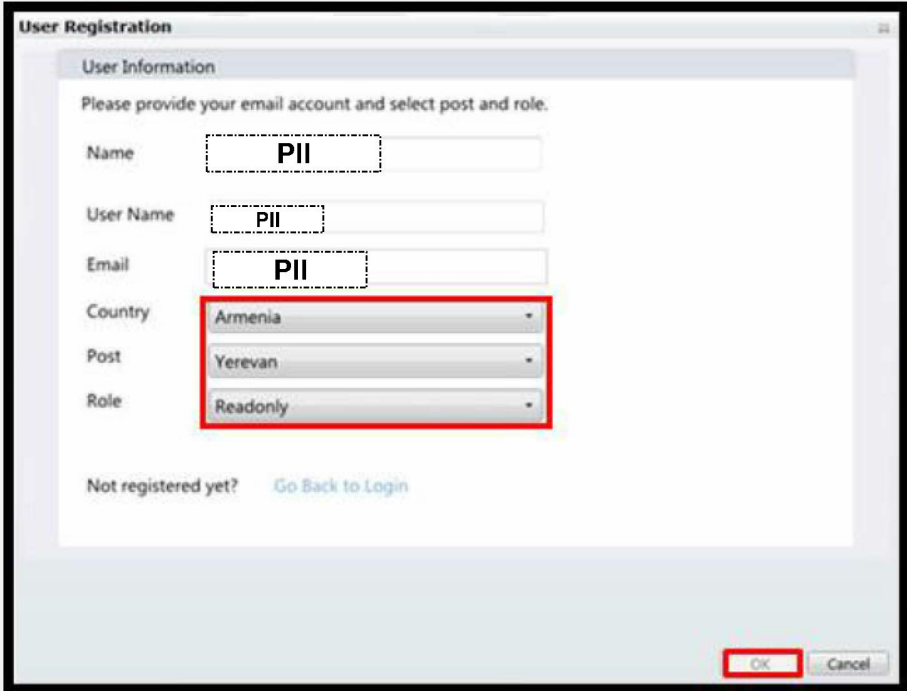
To Register to EAMS:

Step	Action
1	Open Internet Explorer > 
2	Insert your PKI access card (badge) in the reader.
3	A Token Logon window will pop-up, enter Token Passphrase. <i>(This is the same passphrase when logging into your workstation.)</i> 
4	Select OK .
5	The User Login Information window will pop-up with your name and username. <i>Please ensure your username is not a series of numbers.</i> Select Register Now . 

Continued on Next Page

Getting Started

040-060A EAMS Registration (Continued)

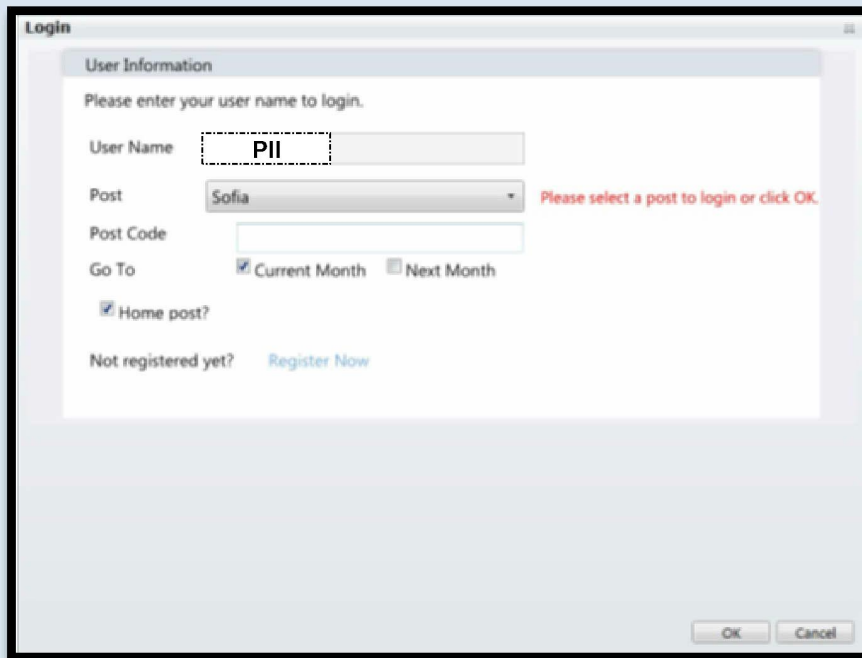
Step	Action
6	<p>In the User Registration window, use the dropdown menus to select the desired Country, Post, and role (Manager). Select the OK button to generate a request for access.</p> 
7	Once your first post has been registered to, send an email to the Scheduling Operations Supervisor or Unit Manager listing the post for access approval.
8	Look for an email from [REDACTED] to confirm that your account has been approved.
9	Close out of your current Internet Explorer and re-open to view your new post in EAMS

Getting Started

040-080 Logging into EAMS

After your EAMS account has been approved, you will now be able to select your post(s), go to **current month**, **next month**, and have a specific post defaulted as your **Home post**.

In addition, you can also register to more posts by selecting **Register Now** and repeating steps 5-9 under [EAMS Registration](#).



The screenshot shows a 'Login' dialog box with the following fields and options:

- User Information** section with the instruction: "Please enter your user name to login."
- User Name**: Text input field containing "PII".
- Post**: Dropdown menu showing "Sofia". A red error message to the right reads: "Please select a post to login or click OK."
- Post Code**: Empty text input field.
- Go To**: Radio buttons for "Current Month" (checked) and "Next Month".
- Home post?**: Checked checkbox.
- Not registered yet?**: Link to "Register Now".
- Buttons**: "OK" and "Cancel" buttons at the bottom right.

Note: If you are having difficulties with logging into EAMS, please reach out to the Scheduling Operations Supervisor or Unit Manager for assistance.

040-998 Revision History

The following manual revisions include changes to this module:

[R040-28APR2022](#) • [R039-01APR2022](#) • [R022-26MAY2016](#) • [R019-20JAN2016](#) • [R005-26FEB2014](#) • [R004-24JAN2014](#)

Post Scheduling Instructions

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060-010 Overview

Each post provides the National Visa Center instructions detailing how they would like their scheduling to be performed each month. These instructions are compiled onto a post specific spreadsheet called “Post Instructions.” This document contains two tabs:

Profile tab: contains the calendar set-ups and scheduling instruction for IV and SIV.

Monthly Calendar tab(s): is where appointment dates, timeslots, applicant counts, and Holiday/admin dates are entered and viewed.

060-020 How to Access and Create Post Scheduling Instructions

Post Instructions can be accessed through the CA-NVC Post Support team's **IV Scheduling** Channel's under the [SharePoint page](#) or [Microsoft Teams](#).

The “[Year] **Post Profiles and Calendars**” folder will have all the Post Instructions located by region.

Post Scheduling Instructions

060-030 Profile Tab

Section	Description/Function
General IV Scheduling Setup	<p>This section is where users can identify what kind of calendar loading type post has and the average Preference/Immediate-Relative percentage split.</p> <p>Loading Type: is the placement of scheduled cases throughout the month.</p> <p>Preference/Immediate-Relative percentage split: is a percentage of how many Preference vs. Immediate-Relative post would schedule for an interview appointment each month.</p>
IV Calendar Setup	<p>This section provides specifics on how the IV calendar should be set up. Some posts prefer to have specific days of the week designated as scheduling/administrative days, as well as to have applicants with certain FSC's, Nationalities, and/or Visa categories scheduled on designated days.</p>
IV Scheduling Instructions	<p>This section provides a description of how NVC schedules the IV appointments. Depending on what post has requested for their IV Calendar Setup, NVC may need to perform scheduling in a certain way in order to fulfill posts requests.</p>
SIV Scheduling Instructions	<p>This section provides a description of how NVC schedules SIV interview appointments. There are some posts that allow NVC to schedule SIV applicants within the general IV capacity, there are some posts who have no instructions that require NVC to reach out to post for SIV capacity.</p>
Holiday List	<p>This section provides a list of Holidays and Administrative days that post has provided.</p>

Post Scheduling Instructions

060-040 Month (Calendar) Tab

The Month (Calendar) Tab is where the appointment dates, timeslots, IV/SIV applicant capacities, and Holidays/Admin days are entered and displayed.

Section	Description/Function																																																																
Capacity Totals Chart	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">IV Capacity:</td> <td style="text-align: center; background-color: #d4edda;">0</td> </tr> <tr> <td>SIV Capacity:</td> <td style="text-align: center; background-color: #d4edda;">0</td> </tr> <tr> <td>DV Capacity:</td> <td style="text-align: center; background-color: #d4edda;">0</td> </tr> <tr> <td>Total Capacity:</td> <td style="text-align: center; background-color: #d4edda;">0</td> </tr> </table>	IV Capacity:	0	SIV Capacity:	0	DV Capacity:	0	Total Capacity:	0																																																								
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<p>This section provides the capacity totals for IV, SIV, and then a grand total. These fields will generate as soon as capacity is entered into the daily timeslots.</p>																																																																	
Time slots	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="8" style="background-color: #a0a0a0;">Sunday</th> </tr> <tr> <td style="background-color: #d9d9d9;">Week 1</td> <td colspan="6"></td> <td style="text-align: center;">1</td> </tr> <tr> <td style="background-color: #d9d9d9;">Time slot</td> <td style="background-color: #d9d9d9;">PIVOT P</td> <td style="background-color: #d9d9d9;">PIVOT IR</td> <td style="background-color: #d9d9d9;">IVIS P</td> <td style="background-color: #d9d9d9;">IVIS IR</td> <td style="background-color: #d9d9d9;">SIV</td> <td style="background-color: #d9d9d9;">DV</td> <td style="background-color: #d9d9d9;">Slot Subtotal</td> </tr> <tr> <td>8:30 AM</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: center;">0</td> </tr> <tr> <td>9:30 AM</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: center;">0</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: center;">0</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: center;">0</td> </tr> <tr> <td style="background-color: #d9d9d9;">Total</td> <td colspan="6" style="text-align: center;">0</td> <td></td> </tr> </table>	Sunday								Week 1							1	Time slot	PIVOT P	PIVOT IR	IVIS P	IVIS IR	SIV	DV	Slot Subtotal	8:30 AM							0	9:30 AM							0								0								0	Total	0						
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Post Scheduling Instructions



060-040A Month (Calendar) Tab (Continued)

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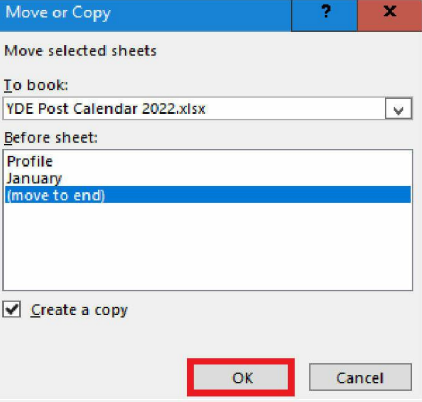

Post Scheduling Instructions

060-040B Month (Calendar) Tab (Continued)

Section	Description/Function												
Calendar Legend	 Scheduling Day <table border="1" style="margin-left: 20px;"> <tr><td>IR</td><td>IV-Immediate-Relative</td></tr> <tr><td>P</td><td>IV-Preference</td></tr> <tr><td>SIV</td><td>Special Immigrant Visa</td></tr> <tr><td>DV</td><td>Diversity Visa</td></tr> <tr><td>PIVOT</td><td>MIV Applicants</td></tr> <tr><td>IVIS</td><td>Paper File Applicants</td></tr> </table>	IR	IV-Immediate-Relative	P	IV-Preference	SIV	Special Immigrant Visa	DV	Diversity Visa	PIVOT	MIV Applicants	IVIS	Paper File Applicants
	IR	IV-Immediate-Relative											
P	IV-Preference												
SIV	Special Immigrant Visa												
DV	Diversity Visa												
PIVOT	MIV Applicants												
IVIS	Paper File Applicants												
	 Holiday/Admin Day <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;">* All capacity entered is per Applicant Count</div> <p>This section is where users can identify what each scheduling category in the <i>category columns</i> represents.</p>												

Note: Not all posts will be the same, as some posts will have specific setups. For example, ABD has “Farsi” and “Non” categories listed:

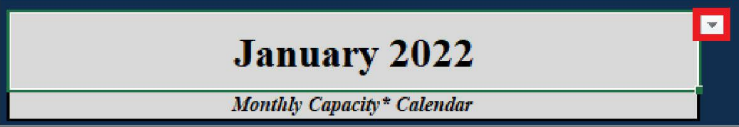
The following procedure is how to create a new monthly Calendar Tab:

Step	Action
1	Right click the most recent scheduling month’s tab. 
2	Click “Move or Copy” > “(move to end)” > Click “Create a copy” > “OK”. This will create a duplicate tab. 
3	Rename the calendar tab per the month being created. 

Continued on Next Page

Post Scheduling Instructions

060-040C Month (Calendar) Tab (Continued)

Step	Action
4	From the month dropdown, select the new month. This should update the days and holidays accordingly. 
5	Delete all the capacity that was entered per the previous month.
6	Update all the sections accordingly per Post's Capacity email.

Post Scheduling Instructions

060-060 Scheduling Guidelines for Post

NVC offers post multiple options for scheduling preferences and calendar settings for IV/SIV appointments. This following provides descriptions and guidelines for each option.

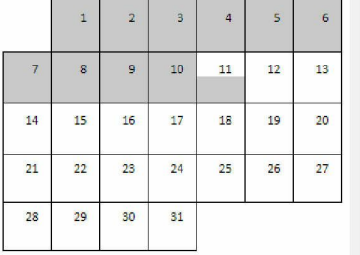
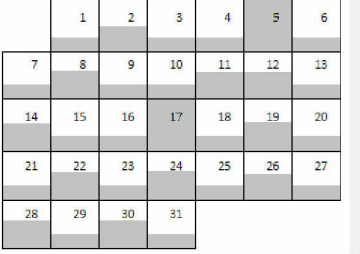
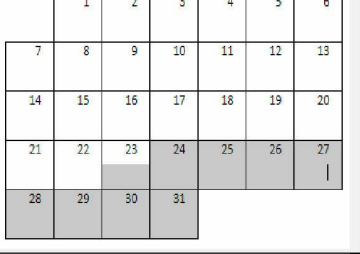
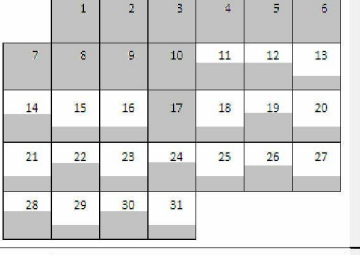
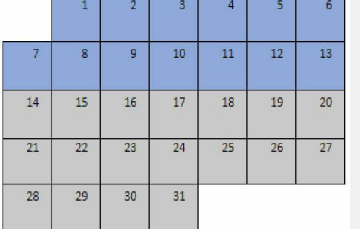
Post may update their settings and preferences by emailing Scheduling Team at NVCPOST@state.gov. In addition, post should be providing the general settings in the monthly capacity emails.

Section	Description/Function
General	<p>NVC wants to know specific Dates and time slots of IV/SIV appointments, as well as Applicant count per time slot. NVC is systematically limited to only being able to schedule by applicant count. Scheduling by case count currently is not an option for IV cases.</p> <p>The scheduling system is only programmed to use the following time increments and cannot use more than one increment at a time: 10min, 15min, 20min, 30min, 45min, and 1hr.</p>
Percentage	<p>Any posts can utilize specific percentages. This is referenced to how many Preference and Immediate-Relative applicants to schedule each day and/or month.</p> <ul style="list-style-type: none">• Example: 50% P / 50% IR <p>The use of scheduling by percentage primarily only impacts backlogged posts, as posts that tend to have open/leftover capacities after scheduling will see all their cases scheduled.</p> <p>Note: <i>depending on the Preference demand each month, NVC may need to manually increase Preference percentages to prevent Preference backlogs from occurring and to ensure all available visa number availability is being used in order to hit the fiscal year allocations.</i></p>

Continued on Next Page

Post Scheduling Instructions

060-060A Scheduling Guidelines for Post (Continued)

Section	Description/Function	
Monthly Loading Type	Posts that are not backlogged can utilize a case loading type. This is referenced to the placement of scheduled cases throughout the month. There are currently a few different options:	
	Front Loading	Cases are loaded to the maximum starting at the beginning of the month. Once the first day has been filled, the next day will be then filled, and this pattern continues until all scheduling days are filled or when there are no more cases to schedule. Note: <i>In months when there are not many applicants to schedule, the appointments will be focused heavily on the beginning of the month with the end of the month vacant.</i>
		
	Balance Loading	Cases are loaded and spread out among all days to create a more balanced month. Note: <i>Days will not be necessarily 100% filled evenly among each day as this will depend on the number of applicants per case.</i>
		
Back Loading	Cases are loaded to the maximum starting at the end of the month. Once the last day is filled, the second to last day will be filled, and the pattern continues until all scheduling days are filled or when there are no more cases to schedule. Note: <i>If there are not enough applicants to schedule, the appointments will be focused heavily on the end of the month with the beginning of the month vacant. This type is rarely used.</i>	
		
Multi Loading	NVC has the capability of using multiple loading types in one calendar month. The most common option is: Front Loading during the 1st round, and then Balance Loading during the 2nd round.	
		
Week Dividing	NVC also has the capability of dividing weeks per rounds. The most common option is scheduling the first two weeks of the month during the 1st rounds and then scheduling the rest of the month during 2nd round.	
		

Continued on Next Page

Post Scheduling Instructions

060-060B Scheduling Guidelines for Post (Continued)

Section	Description/Function
Specific & Specialty Options	<p>NVC can set up a calendar to designate days specifically by FSC, Nationality, Visa Category, and Source (IVIS/PIVOT).</p> <p>Post should be advised to limit these options, as the system is limited to only being able to manage three to four of these options within a calendar. In addition, limitations may also vary depending on the size of the post.</p> <p>To prevent potential backlogs from occurring, post should state whether they would allow backfilling* when requesting specific/specialty options.</p> <p><i>*Backfilling is when post has designated timeslots for certain categories but will allow other categories to be scheduled in those timeslots if necessary, and in order to prevent backlogs.</i></p>

060-998 Revision History

The following manual revisions include changes to this module:

[R040-28APR2022](#) • [R039-01APR2022](#) • [R037-24MAR2020](#) • [R027-29NOV2016](#) • [R023-01AUG2016](#) • [R022-26MAY2016](#) • [R015-20MAY2015](#) • [R004 24JAN2014](#)

EAMS

080 EAMS

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EAMS

080-010 Overview

The **Enterprise Appointment Management System (EAMS)** is the scheduling system that was designed to replace and consolidate the legacy scheduling system of **Immigrant Visa (IVIS)**. EAMS is the main appointment scheduling tool for **Immigrant Visa (IV)** and **Special Immigrant Visa (SIV)** cases, as performed by NVC.

By using a web service, EAMS interconnects with the **pre-IVO technology (PIVOT)** system. EAMS performs the following functions:

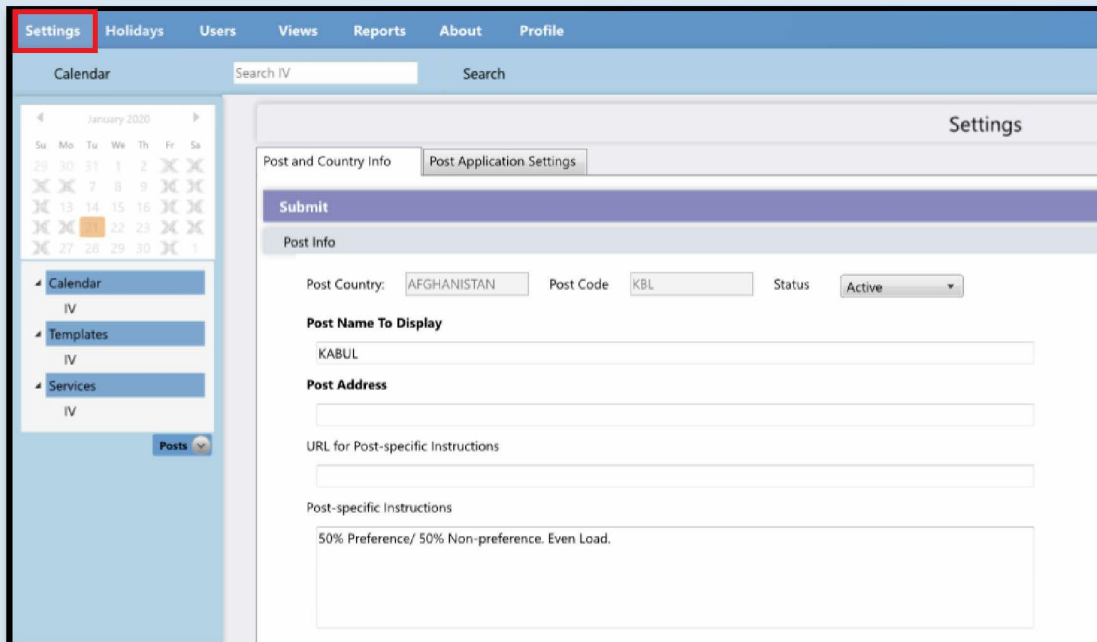
- Provides a user interface to allow NVC to define services offered, tailoring these service templates to a post's operational schedule, and maintaining a calendar of available and assigned appointments.
- Receive the appointment requests directly from PIVOT through a web service.
- Process requests automatically by filling an available appointment slot in the schedule and sending the results to PIVOT.
- Provide the capability to process appointment exceptions. Exceptions occur if no appointments are available in the current month that match the properties of a case.
- Provide the capability to process backlogs. Backlogs are lists of cases for which a suitable appointment has not been matched for more than one month.

EAMS will allow NVC to improve the efficiency of appointment scheduling; it will allow posts to move to a system that allows appointment criteria to be determined based on FSC, language, source (IVIS/PIVOT), visa class in addition to Preference and Immediate-Relative. NVC has the flexibility to arrange post schedules in the manner that best suites each post business needs.

The following modules will provide a breakdown of each area of EAMS with descriptions.

080-020 Settings

The **Settings tab** provides users a general view of the settings and options for post:



080-022 Post and Country Info

Section	Description/Function
Post Country/Code	Displays the country name and the three-letter abbreviation for the city where the U.S. Embassy or Consulate is located. This section is pre-set and cannot be changed
Status	Displays if the EAMS profile is active or inactive
Post Name to Display	Displays the full unabbreviated city name where the U.S. Embassy or Consulate is located. This section should not be changed
Post Address	Displays the physical address of post. <i>Currently, this section is not required.</i>
URL for Post-specific Instructions	Displays the URL/website address of post. <i>Currently, this section is not required.</i>
Post-specific Instructions	Displays general post-specific instructions. <i>Currently, this section is not required.</i>

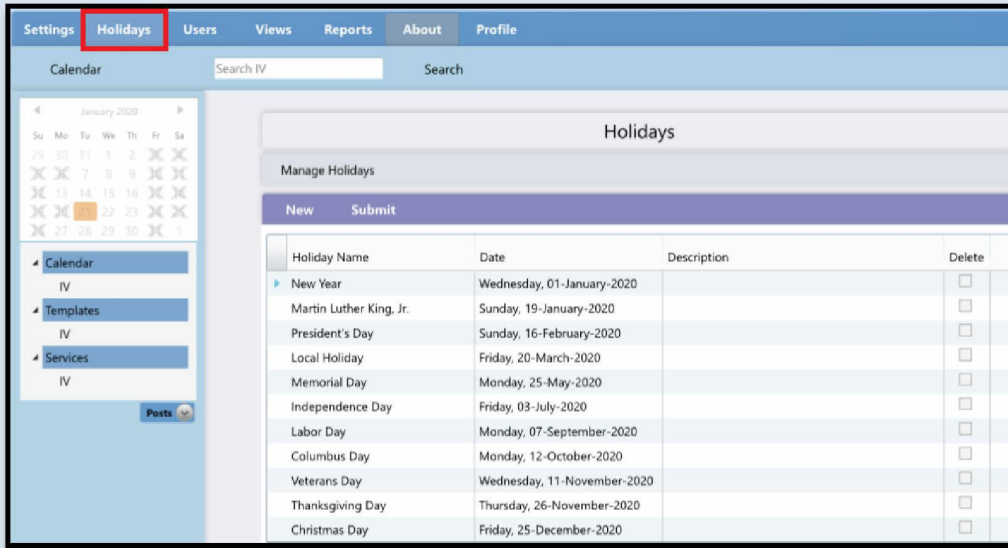
EAMS

080-024 Post Application Settings

Section	Description/Function
Work Days	Days within a week that post has open for booking appointments. All that apply should be checked off.
Work Hours	<ul style="list-style-type: none"> • Start Time and End Time should be the general hours that post is open for. • Daily Break Time should be within the start and end time hours regardless of if post has or does not have a break. Break times is something NVC does not collect. <p>Please note: <i>the Daily Break time cannot interfere with the hours where appointments are expected to be on.</i></p> <p><i>(e.g.: Start/End Time: 9:00 AM – 1:00 PM, Break Time: 12:30 PM. The last appointment must be before 12:30 PM)</i></p>
Timeslot	Duration is how long each appointment lasts for. Posts are not allowed to choose any other duration not listed.
Optional Applicant Fields	Only the CEAC Barcode Required should be checked off.
Services	Only Immigrant Visa (IV) should be checked off. Currently, NVC only manages IV processing.
Calendar Restriction Override	<p>The number of appointments selected from the dropdown will mean how many appointments you can allow the fill backlogs function to override the current settings for timeslots.</p> <p>For example: <i>a calendar is set up to have 5 Preference applicants at 9:00 AM and 5 Immediate-Relatives applicants at 9:30 AM.</i></p> <p><i>All your Immediate-Relative slots have been filled but there are still Immediate-Relative applicants waiting to be scheduled. If there is available Preference capacity but no Preference applicants, the override feature should be turned on, so that the Immediate-Relative applicants can fill in the Preference capacity when filling in the backlogs.</i></p>
Calendar Advance Lock days	Are how many days within the live month where the calendar will lock up and users can no longer make adjustments to the scheduled appointments

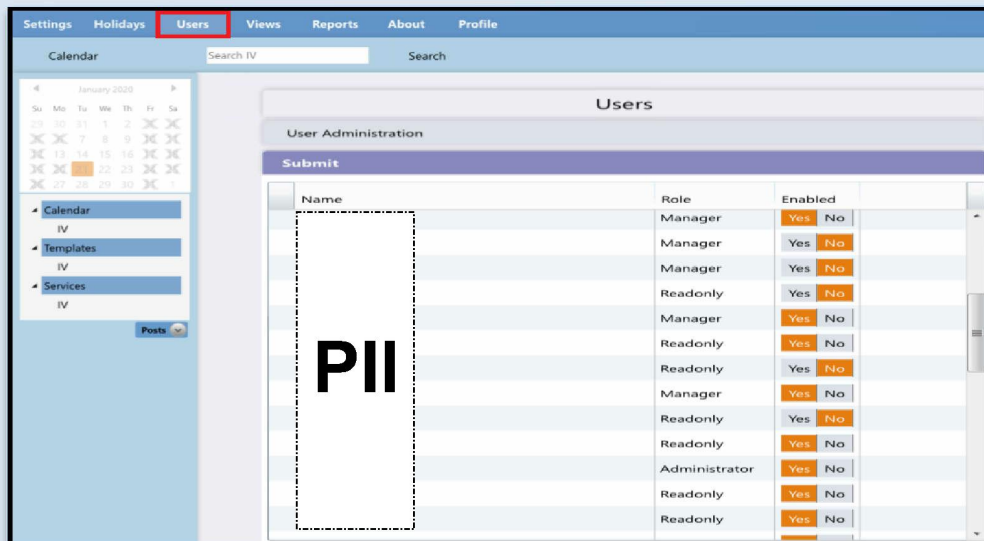
080-030 Holiday

The **Holiday tab** is where users can view a list of **U.S. Federal** and **Local Holidays** for each post. Users with Manager and Administrator roles can add, adjust, and delete Holidays. Please reference



080-040 Users

The **Users tab** provides a complete list of internal and external users who have registered to a specific post. Each type of role is displayed and if the user is currently enabled or not.



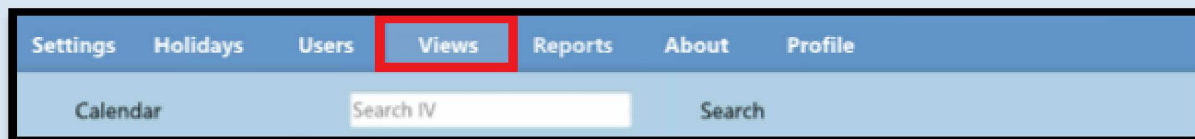
EAMS

080-045 Roles and Responsibilities

Role	Responsibilities
Administrator	<p>Administrator roles have the same responsibilities as a Manager role with the inclusion of the following:</p> <ul style="list-style-type: none">• Manages and assigns user roles• Manages Post settings and Post default calendar settings• Grants administrator, manager, and read only user rights and fulfills requests for administrative user accounts.
Manager	<ul style="list-style-type: none">• Creates post calendars, modifies post calendars• Publish/Un-publish calendars (makes them available to PIVOT through the web service)• Creates calendar slot allotments• Reviews appointment exception logs and backlogs• Reviews scheduled appointments• Manually processes appointment exception logs and backlogs• Copies monthly calendars and calendar templates• Manages post holidays and calendar exception days.
Read-Only	<ul style="list-style-type: none">• Reviews Post profiles and default calendar settings• Reviews Post appointment calendars• Reviews appointment request exception log and appointment backlog• Reviews scheduled appointments

080-050 Views

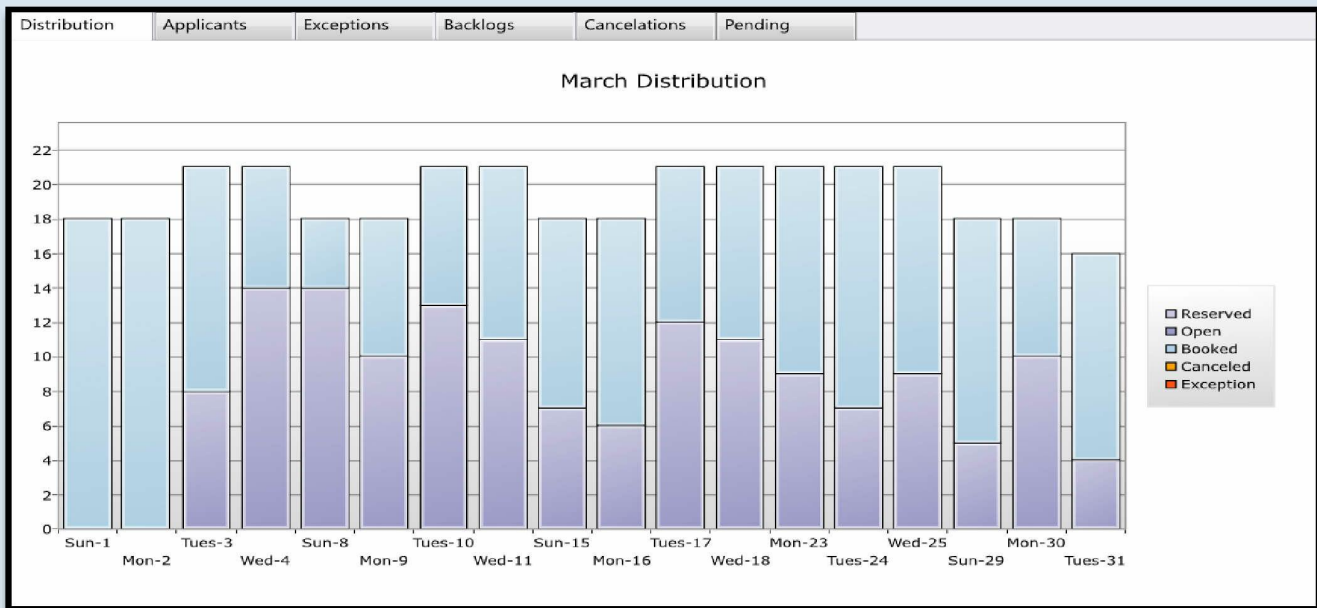
The **Views** tab allows users different methods of viewing scheduled applicants, applicants that are waiting to be scheduled, and ones who have been canceled.



Users can also navigate to these lists via the **Week Tab** from the main calendar screen and then selecting **Applicants**.

080-060 Distribution

The **Distribution** tab displays a stacked column chart to provide users a visual layout of each day with designated color scheming to show if there is open capacity, booked capacity, and canceled appointments, etc. Hovering the mouse cursor over the bars will also reveal the total number for each section.



EAMS

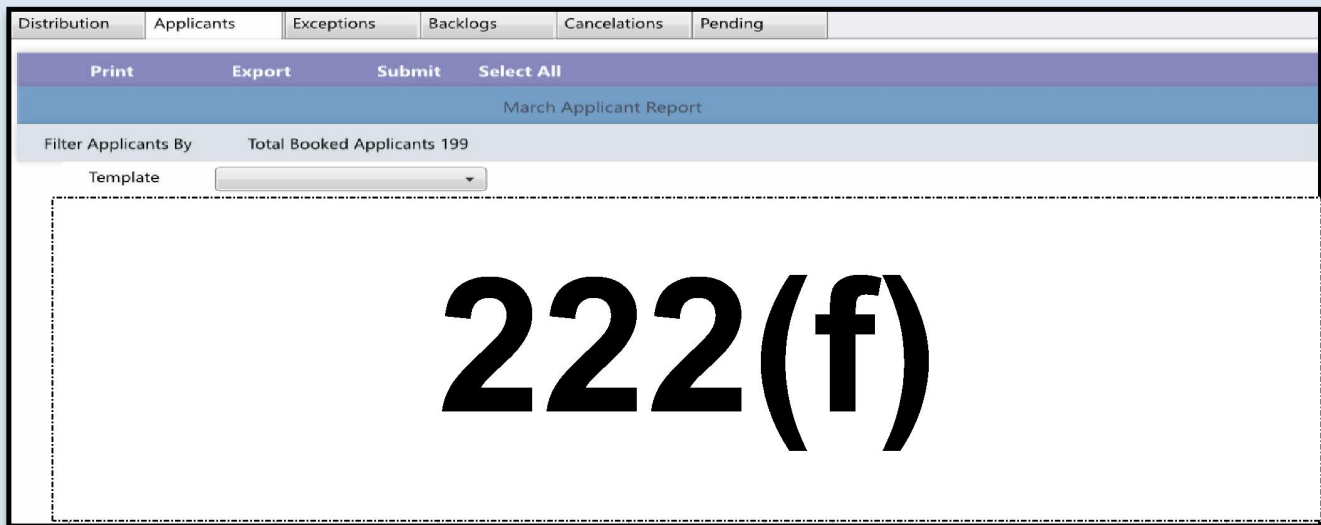
080-070 Applicants

The **Applicants** tab displays a complete list of scheduled applicants for the selected month.

Each applicant on a case will have their own individual line (and may not be grouped together in the applicant list) with their information broken down by the following columns:

Name, Case ID, Slot Date (Interview date), Qualify Date (Documentarily qualified date), Source, FSC, Nationality, Preference, and Visa Class. In addition, exporting the list into Excel will display an additional column: *Scheduled Date*.

Export option is available, and it will be via Excel.



EAMS

080-080 Exceptions

The **Exceptions** Tab displays a list of newly documentarily qualified Immediate-Relative cases and Preference cases that have been reported/allocated and pushed into EAMS for that month.

080-082 Backlogs

If any applicants that were in the previous months Exceptions Tab did not receive an interview appointment, they will be re-located into the Backlogs queue once the month changes over to a new month.

Note: *Preference cases should never be in the Backlogs tab. Preference cases are removed from EAMS after each month has been scheduled and closed out. If Preference cases are in this tab, please notify you Operations Supervisor for assistance.*

080-090 Cancellations

If a scheduled case is canceled by a "Scheduled in Error" selection , the case will be relocated to the Cancellations Tab.

Note: *When an IVIS case is canceled with "Scheduled in Error" as the cancellation reason, the case will be unscheduled in IVIS, and a system generated note will be entered. However, if a PIVOT case is canceled using the same reason, the status will remain that its scheduled "Scheduling under Review", but the interview will be canceled on the backend.*

080-092 Pending

Cases that have been newly submitted into EAMS will sit in this tab/queue to process before they go into the Exception queue. These cases cannot be scheduled.

Note: *The duration of how long cases pending for will vary on the volume of cases that were sent into EAMS. Additionally, if a case is in Pending, you are not able to "search" the case.*

EAMS

080-100 Service, Template, and Calendar

A **Service** must be created prior to creating a template, as a service is the foundation of an EAMS calendar that provides the general capacity totals for each service routing. IV services may be based on the following criteria:

- Foreign State of Chargeability Code (FSC)
- Preference/Immediate-Relative
- Visa Class
- Nationality
- System Source (PIVOT/IVIS)

There can only be one service per template, but multiple templates can be placed within a calendar to allow multiple services to be utilized. Please reference [120-042 Service Creation](#) for instructions on how to create a **Service**

Note: *Once a service has been created for a post, it does not need to be created again, unless that post requests a different type of scheduling that would require a new service routing.*

A **Template** is what is created to open capacity and activate the actual *calendar* to allow appointment scheduling to take place. Once a new calendar is created, it will be available under Templates. Please reference [120-044 Template Creation](#) for instructions on how to create a **Template**.

A **Calendar** is the final product of all enabled templates for the month. This portion will mimic the Post Instruction that we use to update a post's capacity before transferring them into EAMS.

080-998 Revision History

The following manual revisions include changes to this module:

[R040-28APR2022](#) • [R039-01APR2022](#) • [R037-24MAR2020](#) • [R032-21AUG2018](#) • [R023-01AUG2016](#) • [R004-24JAN2014](#)

Capacity Requests

100 Capacity Requests

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100-020 Capacity Email (20th of the Month)

On the **20th of every month** (or the following Monday if the 20th lands on a weekend, or the following day if the 20th lands on a Holiday), the Scheduling Team emails every post (per regional distribution list) for updated capacity numbers for that requested month as well as dates/times, and any preferred/specialty requests. Below is a breakdown on what is requested:

- **Dates** of IV/SIV appointments.
- **Times** of IV/SIV appointments.
- **Applicants count** per time slot.
- **Preferred/Specialty Scheduling:** Preference/Immediate Relative, FSC, Nationality, Language, Visa category, and Source (IVIS, PIVOT, or both).

These requests are sent out 1 month in advance from the month that appointments are being scheduled for.

For example: if the current date is April 20th, then July calendars are to be requested. If you are assigned with the task of requesting capacity calendars, follow the instructions below:

Step	Action
1	Open Outlook
2	Create a New Email
3	Enter the Regional Distribution list according to your assigned Region into the "To:" line: <ul style="list-style-type: none"> • AF Region • EAP Region • EUR Region • NEA Region • SCA Region • WHA Region (split into 3 sub regions)
4	Copy and Paste the 020-010 - [Month Year] Capacity Request [Post][Region] template from the Scheduling Emails Template Manual into the "body" of the email.
5	Edit all areas that have [Month Year] to the month being requested.
6	Edit [7 business days from sending date] .
7	Use the title of the template as the "Subject" line of the email.
8	Once the email has been verified it can be sent.

Capacity Requests

100-998 Revision History

The following manual revisions include changes to this module:

[R040-28APR2022](#) • [R039-01APR2022](#) • [R037-24MAR2020](#) • [R023-01AUG2016](#) • [R022-26MAY2016](#) • [R019-20JAN2016](#) • [R015-20MAY2015](#) • [R014-05MAY2015](#) • [R013-20MAR2015](#) • [R012-06MAR2015](#) • [R010-26DEC2014](#) • [R005-26FEB2014](#) • [R004-24JAN2014](#)

Calendar Creation

120 Calendar Creation

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Calendar Creation

120-010 Capacity Responses

Shortly after the **Capacity emails** have been sent, posts will begin submitting their capacities via email. Each post submits these requests differently, so it is crucial to read the email carefully and completely throughout. Below are some examples:

HCMC - PROPOSED NUMBERS OF APPLICANTS FOR FEBRUARY 2020

a) Please schedule applicants by Preference/Non-Preference and IVIS/PIVOT. Post prefers to schedule IVIS applicants (if any) in the earliest timeslot(s).
 b) Please spread out employment-based preference cases (if any) over the month rather than schedule all on the same day.
 c) Please don't backfill Preference timeslots with Non-preference applicants without asking Post first.
 d) Please arrange physical IVIS case files in boxes/shippers to post by interview date-time and round of scheduling if possible for our timely processing. Thank you.

DATE	NOTE	NVC - 7:30 Non-preference	NVC - 7:30 Preference	NVC - 8:00 Preference	TOTAL NVC applicants	EYE: POST schedule	TOTAL NVC & POST applicants	
1-Feb-20	Sat							
2-Feb-20	Sun							
3-Feb-20	Mon		50	80	100	230	240	
4-Feb-20	Tue		50	80	100	230	240	
5-Feb-20	Wed	No interview (Admin day)						
6-Feb-20	Thu		80	70	100	250	260	
7-Feb-20	Fri		80	70	100	250	260	
8-Feb-20	Sat							
9-Feb-20	Sun							
10-Feb-20	Mon		40	100	100	240	250	
11-Feb-20	Tue		40	100	100	240	250	
12-Feb-20	Wed	No interview (Admin day)						
13-Feb-20	Thu		40	100	100	240	250	
14-Feb-20	Fri		30	100	70	200	210	
15-Feb-20	Sat							
16-Feb-20	Sun							
17-Feb-20	Mon	HOLIDAY						
18-Feb-20	Tue		40	100	100	240	250	
19-Feb-20	Wed	No interview (Admin day)						
20-Feb-20	Thu		80	70	100	250	260	
21-Feb-20	Fri		80	70	100	250	260	
22-Feb-20	Sat							
23-Feb-20	Sun							
24-Feb-20	Mon		80	70	100	250	260	
25-Feb-20	Tue		80	70	100	250	260	
26-Feb-20	Wed	No interview (Admin day)						
27-Feb-20	Thu		80	70	100	250	260	
28-Feb-20	Fri		40	100	100	240	250	
29-Feb-20	Sat							
TOTAL		890	1,250	1,470	3,610	150	3,760	

(Drafted on Dec 13, 2019)

Total NVC Non-preference applicants:	890
Total NVC Preference applicants:	2,720
Total NVC applicants:	3,610

Greetings from Ashgabat,

Please see below IV/SIV/DV scheduling preference for March:

IV/SIV schedule:

- Dates of IV/SIV appointments: March 4
- Times of IV/SIV appointments: 2:30, 3:00, 3:30
- Applicant count per time slot: 3 (or one family)
- List of Holidays and/or Admin days for 2020 will be provided as soon as it is available.

DV schedule:

- Dates of DV appointments: March 11, 25
- Times of DV appointments: 2:30, 3:00, 3:30
- Applicant count per time slot: 3 (or one family)
- List of Holidays and/or Admin days for 2020 will be provided as soon as it is available.

Consular Assistant,
 U.S. Embassy Ashgabat,
 Turkmenistan

Calendar Creation

120-020 Holiday & Admin Days

At the end of each **October**, new Holiday Lists are to be requested from each post for the upcoming new year. Please refer to the [Scheduling Email Templates Manual](#) for the appropriate language.

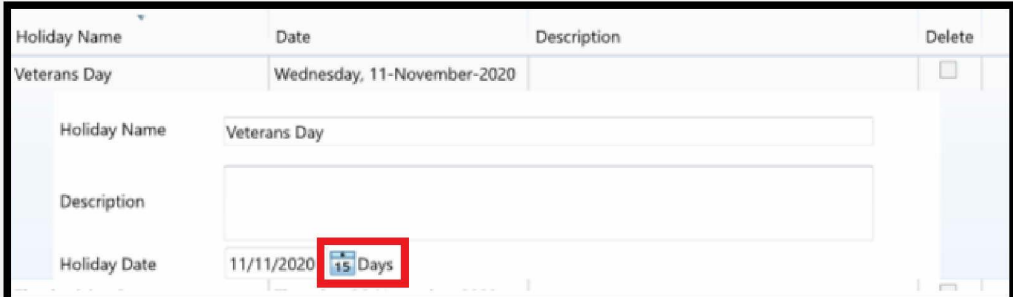
Note: *Not all posts are capable of providing these lists right away and their Holidays may differ. Some posts observe U.S. Holidays on different days than when the actual Holiday is, and some local holidays are dependent on additional factors that may move the date around.*

Additionally, Holidays and Administration days are also requested on the monthly **20th of the month emails** to ensure we are up to date with post. Below are steps on how to adjust, add, and delete Holidays from EAMS.

120-032 Adjust Holidays

All **U.S. Federal Holidays** are pre-set into the Holidays tab for all post, however not all post observes these U.S. holidays on the same day and require adjusting.

To **Adjust** holidays:

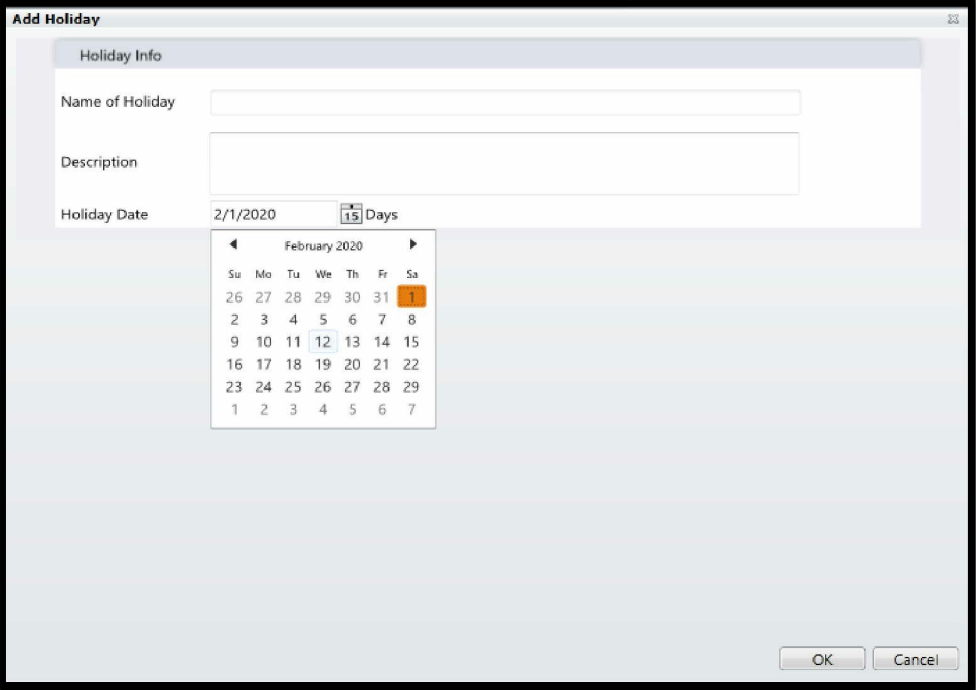
Step	Action
1	Open the Holiday Tab
2	Select the specific Holiday from the list
3	Select the day from the mini calendar to adjust the holiday to: 
4	Select Submit to save the change

Calendar Creation

120-034 Add Holidays

Local Holidays are also observed at post and will need to be added to the list.

To **Add** Holidays:

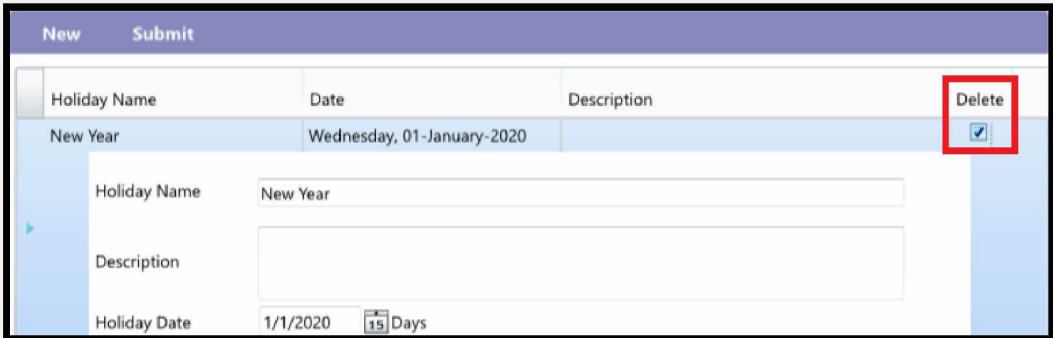
Step	Action
1	Open the Holiday Tab .
2	Choose New from the ribbon.
3	Name of Holiday should always be: " Local Holiday ."
4	Description is not needed.
5	Select the day the Holiday falls on from the mini calendar . 
9	Select OK .
10	Select Submit to save the change..

Calendar Creation

120-036 Delete Holidays

If necessary, **Holidays** can also be deleted from the list.

To **Delete** Holidays:

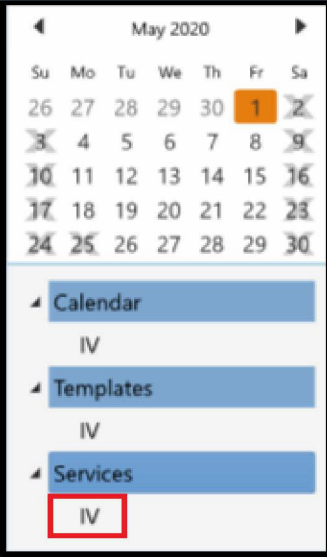

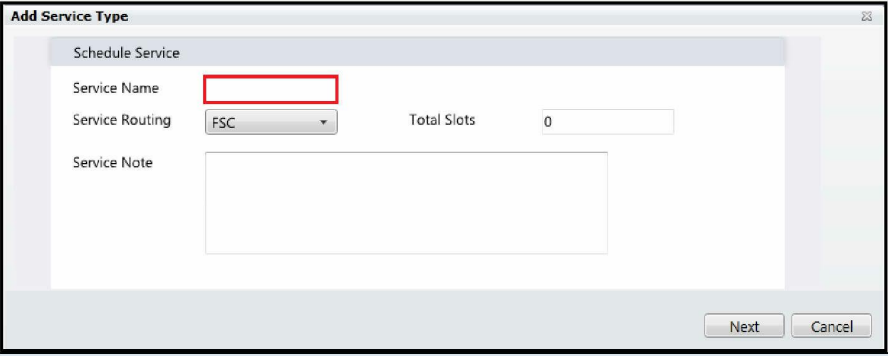
Step	Action
1	Open the Holiday Tab .
2	Choose a Holiday to delete > Check of the Delete box: 
3	Select Submit to save the change.

Calendar Creation

120-040 Creation: EAMS

The first step of creating a calendar in EAMS, is to ensure there is a service created that fits posts needs on how they want their calendar setup. This can be by Visa class, FSC, Nationality, Preference, and/or a combination of those. Follow the steps below for each section's creation:


120-042 Service Creation

Step	Action
1	<p>Click the IV under Services on the left-hand side of the screen:</p> 
2	<p>Click New under the Services tab:</p> 
3	<p>Enter the name in the Service Name field:</p> 

Continued on Next Page

Calendar Creation

120-042A Service Creation (Continued)

Step	Action
4	<p>Select the appropriate routing option in the Service Routing drop-down menu. Select one of the following options:</p> <ul style="list-style-type: none"> • FSC • Preference • Visa Class • Language
5	<p>Enter the number of daily slots in the Total Slots field.</p> <p>If you select Preference, this system will prompt you to enter the daily slot totals for Preference and Non-Preference (<i>Immediate-Relative</i>) slots:</p> 
6	<p>Enter any necessary comments/notes in the Service Note field (optional).</p>
7	<p>Click OK for Preference/Non-Preference (<i>Immediate-Relative</i>) services –or– for FSC, Visa Class and Language services, click Next on the bottom right-hand portion of the screen.</p>
8	<p>Select the desired FSC, Visa Class or Language from the dropdown menu.</p>
9	<p>Allocate the number of daily slots in the Allocated Slots column to each selection.</p> <p>Note: <i>The number of available slots in the Available Slots column is dynamic and will indicate how many are still available.</i></p>
10	<p>Click OK on the bottom right-hand portion of the screen.</p>
11	<p>Click Submit on the ribbon at the top of the screen to save the service.</p>
12	<p>The total number of time slots per day on the service may need to be adjusted/increased depending on capacity needed per scheduling month.</p>

Calendar Creation

120-044 Template Creation

Step	Action
1	Navigate to the month you wish to create a calendar for.
2	Click Calendar on the upper left-hand corner of the main screen.
3	Click the Week Tab.
4	Click New to open an empty Template form.
5	Under Calendar Info : <ul style="list-style-type: none">• Select the desired service from the Service drop-down menu• Enter a new name for the template to replace the default name inherited from the service. Recommended naming convention: "June 2011", "May 2015: IR/CR", "July 2018: IRAN", etc.• Uncheck: <i>Default Post Settings</i> and <i>Published</i> under the Calendar Type.
6	Under Frequency : <ul style="list-style-type: none">• Select which weeks and days to include within the date range.
7	Under Daily Frequency : <ul style="list-style-type: none">• Select the desired daily start time and end time using the clock icons. Times can also be manually typed in the box.• Select a timeslot duration from the drop-down options.
8	Under Duration : <ul style="list-style-type: none">• Select the desired start date and end date using the calendar icons.
9	Under Exceptions Days : <ul style="list-style-type: none">• Select the desired date(s) using the calendar icons <p>Note: Please don't regularly use since this can cause issues with the templates in EAMS.</p>
10	Under Include or Exclude : <ul style="list-style-type: none">• (If any) Select any desired FSC's, Nationalities, Visa Classes, and/or Sources that should be specifically excluded or the only ones to be included from the calendar <p>For example: Kabul has two templates: one for IV's and the other for SIV's. When creating the IV template: SIV visa categories should be exclude, and when creating the SIV template: SIV visa categories should be the only ones included.</p>
11	Under Summary : <ul style="list-style-type: none">• Review to ensure the parameters chosen are correct.

Continued on Next Page

Calendar Creation

120-044A Template Creation (Continued)

Step	Action
12	Click Next on the bottom right-hand corner of the screen.
13	Under Daily Slots Distribution: <ul style="list-style-type: none">The High Load Occurrence should always be either Front or Balance. This will depend on posts preferences.
14	Under Monthly Slots Distribution: <ul style="list-style-type: none">The Load Occurrence should reflect what is listed in Post Instructions for that specific post. <i>However, the defaulted load should be Balance if not known.</i>
15	Under Select a Service for this Calendar and Sort Slots By: <ul style="list-style-type: none">The information here should be auto populated and no additional edits are required.
16	Under Daily Service Slots Allocation: <ul style="list-style-type: none">Enter in the general capacity totals for each timeslot. If there is no capacity, 0 must be entered.
17	Click OK on the bottom right-hand corner of the screen to finalize and save the calendar. A confirmation will pop-up that the calendar has been created. Occasionally an error screen will pop-up, this will require the template to be re-created, select Cancel on the bottom right-hand corner of the screen to re-created.
18	Review each day and timeslot to ensure the capacity is correct according to posts requests. Adjusts as needed.

120-998 Revision History

The following manual revisions include changes to this module:

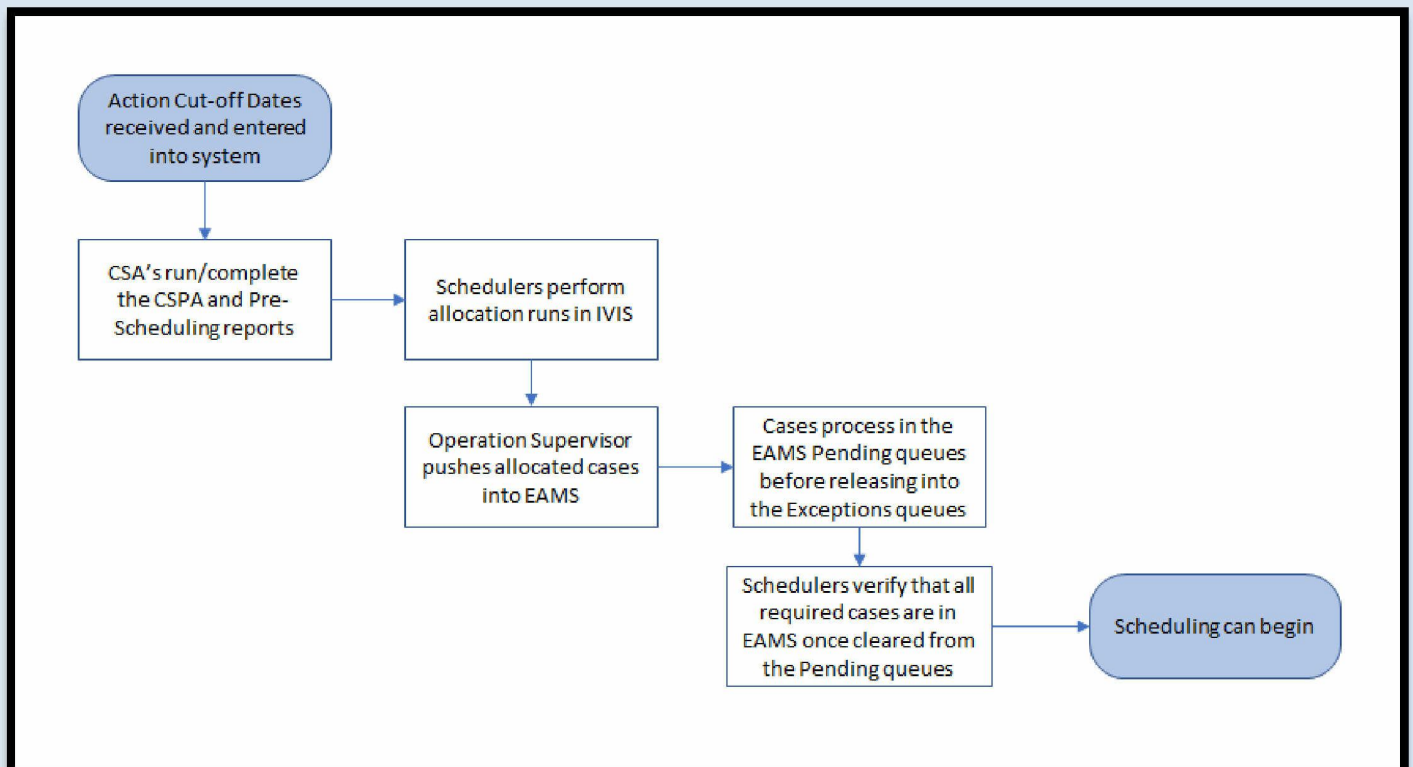
[R040-28APR2022](#) • [R039-01APR2022](#) • [R029 31JAN2017](#) • [R022-26MAY2016](#) • [R015-20MAY2015](#) • [R010-26DEC2014](#) • [R005-26FEB2014](#) • [R004-24JAN2014](#)

Visa Allocation

140 Visa Allocation

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140-010 Overview



Visa Allocation

140-020 Allocations

All Preference visa categories that are current by the final action date receive an allocation date when the allocation process has run. The allocation date indicates the case is ready for scheduling.

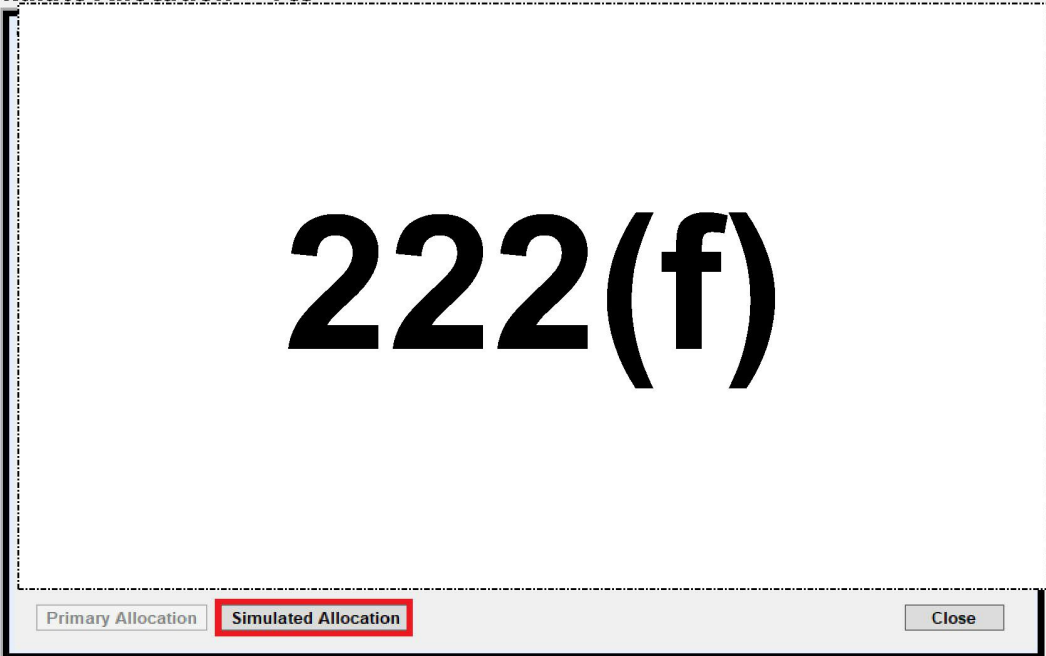
- **IVIS cases:** the allocation date is listed on the **Documents tab** under "**Allocated by VO**"
- **PIVOT cases:** there is a notification under the **Activity History** that states, "**Audit allocation status has been changed to ALLOC.**" The date of allocation is when this is populated.

Note: We do not schedule all cases that we allocate.

140-022 IVIS

The allocation process can begin once the scheduling CSA/Operations Supervisor has notified the team that the CSPA/pre-scheduling reports have been completed by Document Review.

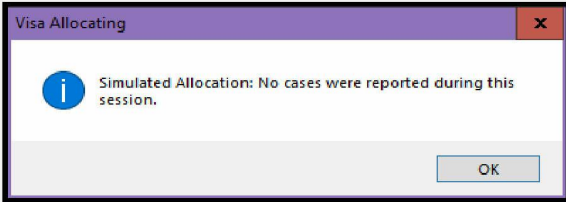
To allocate posts:

Step	Action
1	Open IVIS > Packet Control-1
2	Select PacketControl > Allocate Visas...
3	Select a post from the drop-down
4	Select Simulate Allocation > Yes  <p>Note: This is just the simulation run and cases will not be updated until the Primary is run. Simulation must be run first in order for the Primary Allocation button to be active.</p>

Continued on Next Page

Visa Allocation

140-022A IVIS (Continued)

Step	Action
5	Select Primary Allocation > Yes Document the total number of applicant allocations for each post.
6	If you receive the following pop-up, it simply means no cases were allocated for that post and a "0" should be documented as the allocation total.  A screenshot of a software pop-up window titled "Visa Allocating". The window has a purple header bar with a close button (X) on the right. Below the header is a white area containing a blue information icon (i) and the text "Simulated Allocation: No cases were reported during this session." At the bottom right of the white area is a grey button labeled "OK".
7	Repeat steps 3 through 5 for each post.
8	Once Allocation is complete, check that the correct number is represented on the IVIS Preference Report.

140-024 PIVOT

NVC schedulers do not perform PIVOT allocations. This process is done as an automatic job in PIVOT. Once the system detects that new final action dates have been submitted, the job runs.

For PIVOT to run the allocation job, the Visa Office must make the final action dates official through their IVAMS system.

When the dates have been officially submitted through IVAMS, they will trickle into PIVOT to await allocation and the query will be initiated by CST.

Visa Allocation

140-030 Case Push into EAMS

When cases have been allocated, they will go into the PIVOT Schedule Administration queue to await their push into EAMS. This process of pushing cases into EAMS is performed on the **1st of each month**, or the following day if the 1st falls on a weekend and is performed by the scheduling Operations Supervisor/Unit Manager.

The Operations Supervisor/Unit Manager will notify the team when this has been completed so that schedulers can begin to look out for their cases in the EAMS [Pending Queues](#).

IMPORTANT:

Cases that are processing in the Pending queue must clear out before scheduling can start.

140-040 Pre-Scheduling

The **Pre-Scheduling** stage is a crucial part of the scheduling process and must be accurately completed before each post is scheduled.

During this stage, perform each step to ensure:

- Documentarily completed cases from each source (IVIS or PIVOT) and from each visa categories (Preference or Immediate Relative) are sorted in FIFO (First in First Out) of oldest qualified date.
- Cases with the same Petitioner ID are coalesced to schedule together.
- PIVOT cases with "Y" indicator of Fraud Review Pending are marked to not schedule along with any related case.

To perform pre-scheduling, follow the procedures below

STEP	ACTION
1	Open the MGT Report application > SCHED > Preference cases (1.A and 1.B) or Immediate-Relative cases (2.A and 2.B) (for both PIVOT and IVIS (sent daily to main Scheduling inbox).
2	Create Excel spreadsheet .
3	Filter the page to display only the post you are reviewing and comparing.
4	Copy the data into a blank workbook: <ul style="list-style-type: none">• Enter PIVOT IR first and IVIS IR into "IR" tab• Enter PIVOT Pref first and IVIS Pref into "Pref" tab
5	Align the headers of the data for each tab: <ul style="list-style-type: none">• PIVOT cases will have their PET ID and Group Petition ID start with "IVS"• IVIS cases will not have Group Petition ID If combining IVIS and PIVOT IR reports to one spreadsheet, insert columns by clicking column 'H' and 'I' on IVIS IR spreadsheet.

Continued on next page

Visa Allocation

140-040A Pre-Scheduling (Continued)

STEP	ACTION
6	Highlight the spreadsheet and sort per Qualified Date. "
7	Highlight the PET ID and Group Petition ID columns.
8	From the Conditional Formatting drop down > Highlight Cells Rules > select Duplicate Values.
9	This process will highlight cases with the same PET ID in red/pink.
10	<p>Cut and paste cases with the same PET ID to be close in proximity</p> <div style="border: 1px dashed black; padding: 10px; text-align: center; margin: 10px auto; width: fit-content;"> <h1>INA 222(f)</h1> </div> <p>Follow established cross-reference rules:</p> <ol style="list-style-type: none"> 1. F2A with F2A (either parent-child or child-child) 2. IR1/CR1 with IR2/CR2 3. IR2/CR2 with IR2/CR2 4. IR5 with IR5 5. Any SU with another SU <p>Note: <i>This step may be skipped when scheduling large volume Posts.</i></p>
11	<p>Filter the page to display cases with "Y" Fraud Pending Indicator:</p> <ul style="list-style-type: none"> • Highlight the Fraud cases in red • Highlight any cross-referenced cases in red
12	You are ready to cross check the pre-scheduling list you created with the data in EAMS.

Visa Allocation

140-060 Verifying if Cases are in EAMS

It's helpful for schedulers to verify applicants that are waiting to be scheduled (cases located on Preference and Immediate-Relative Reports) are in EAMS prior to the calendar being scheduled. This verification step helps prevent schedulers from doing multiple waves of scheduling per round, due to having to go back in and schedule applicants that were originally missing. Though this is a huge time saver, it is not required to do.

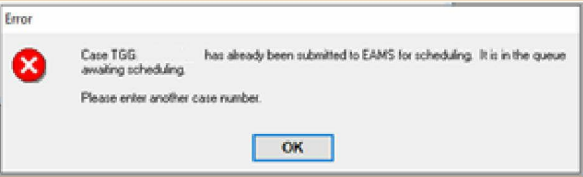
This process is done by reviewing and comparing the Preference/Immediate-Relative reports to what is currently in the EAMS queues:

STEP	ACTION
1	Open EAMS .
2	Go to the Views or Week Tab and select Applicants .
3	Go to each queue: Exceptions/Backlogs/Cancelations , and select " Export ."
4	Select OK, rename files, and save files to desktop/or designated folder.
5	Open each Exceptions/Backlogs/Cancelations file.
6	Copy case numbers from the Exceptions/Backlogs/Cancelations reports.
7	Paste case numbers into the Preference/Immediate-Relative tab.
8	Select all case numbers > apply Conditional Formatting > select Highlight Cell Rules > select Duplicate Values .

Continued on next page

Visa Allocation

140-060A Verifying if Cases are in EAMS (Continued)

STEP	ACTION
9	<p>Cases highlighted in red/pink mean they are in EAMS.</p> <p>Any cases not highlighted mean they are not in EAMS. Any missing IVIS cases may need to be re-submitted into EAMS from the IVIS platform:</p> <ul style="list-style-type: none">• IVIS Packet Control > Packet Control > EAMS Schedule Individual Case > Insert case number > Enter> if case gets submitted submit again to see error case has been submitted..• If you receive the error below, that means the case is missing.  <p>If the IVIS cases are still missing after the re-submission, enter the cases onto the Missing Issues Spreadsheet in Teams. Any missing PIVOT cases should be entered onto the Missing Issues Spreadsheet in Teams.</p> <p>Missing cases may require the assistance from the EAMS/PIVOT development team to get them into EAMS. An Operations Supervisor will submit a ticket and monitor the issue.</p>

Note: Preference cases should not be in the Backlogs queue. If any are identified, please notify the Operations Supervisor.

Visa Allocation

140-998 Revision History

The following manual revisions include changes to this module:

[R040-28APR2022](#) • [R039-01APR2022](#) • [R037-24MAR2020](#) • [R029 31JAN2017](#) • [R023-01AUG2016](#) • [R022-26MAY2016](#) • [R015-20MAY2015](#) • [R004 24JAN2014](#)

Scheduling

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160-005 Overview

There are two methods to scheduling in EAMS:

- **Hand/Manual Scheduling:** scheduling one case at a time to ensure accuracy and to allow users to override the constraints of the calendar.
- **Automated/Fill Backlog Scheduling:** systematically allow any existing appointments in the exceptions or backlog queues to book the appointments, which requires the calendar to be published. Only those with the Administrator or Manager role will have this option.

Scheduling

160-020 Manual Scheduling

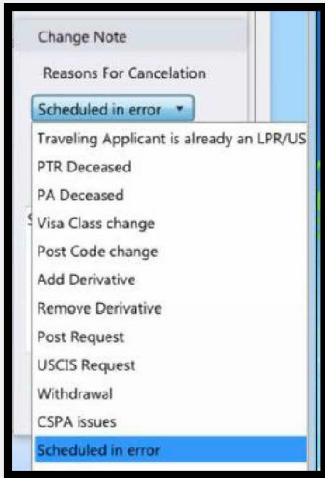
The manual scheduling can be performed as followed:

Step	Action																				
1	Open the EAMS Scheduling Calendar and validate the month you wish to schedule on.																				
2	Enter the case number in the "Search IV" section and click "Search" to identify it in EAMS. Case may need to be searched twice to schedule.																				
3	<p>Click the "Template" drop-down box and select the appropriate option.</p> <table border="1"><thead><tr><th>Name</th><th>Case ID</th><th>Slot Date</th><th>Slot Size</th><th>Qualify Date</th><th>Source</th><th>FSC</th><th>Nationality</th><th>Preference</th><th>Visa Class</th></tr></thead><tbody><tr><td colspan="10" style="text-align: center;">INA 222(f)</td></tr></tbody></table> <p>If there is a red box around the date, only click the calendar icon next to the date and re-select the date until red box disappears.</p>	Name	Case ID	Slot Date	Slot Size	Qualify Date	Source	FSC	Nationality	Preference	Visa Class	INA 222(f)									
Name	Case ID	Slot Date	Slot Size	Qualify Date	Source	FSC	Nationality	Preference	Visa Class												
INA 222(f)																					
4	<p>Select the appropriate "Slot Date and Time". EAMS will alert you if there are not slots available at the desired time. Please make sure to make the same selections for applicants of the same case or for cross-referenced applicants below:</p> <ol style="list-style-type: none">1. F2A with F2A (either parent-child or child-child)2. IR1/CR1 with IR2/CR23. IR2/CR2 with IR2/CR24. IR5 with IR55. Any SU with another SU <p>Note: Cross-referenced PIVOT and IVIS applicants with the same Petitioner will share the same Petitioner ID (Depicted as "pet id" in the reports from MGT Reports). If the PIVOT applicants have the same Group Petition ID, they will show up together when one of the cases is searched in EAMS. Not all the cases with the same Petitioner ID should be scheduled together.</p>																				
5	Click "Submit" on the upper left-hand portion of the screen to save the selections. Repeat steps one through five for all applicable cases.																				

Scheduling

160-030 Manual Cancellation

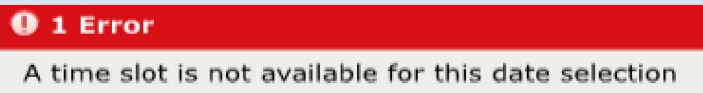
If a scheduling correction is required, the manual cancellation can be performed as followed:

Step	Action																		
1	Open the EAMS Scheduling Calendar and validate the month you wish to schedule on.																		
2	Enter the case number in the "Search IV" section and click "Search" to identify it in EAMS.																		
3	<p>Click "Remove" and "Yes" under the "Cancel" column:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Case ID</th> <th>Slot Date</th> <th>Qualify Date</th> <th>FSC</th> <th>Nationality</th> <th>Preference</th> <th>Visa Class</th> <th>Cancel</th> </tr> </thead> <tbody> <tr> <td colspan="9" style="text-align: center;">INA 222(f)</td> </tr> </tbody> </table>	Name	Case ID	Slot Date	Qualify Date	FSC	Nationality	Preference	Visa Class	Cancel	INA 222(f)								
Name	Case ID	Slot Date	Qualify Date	FSC	Nationality	Preference	Visa Class	Cancel											
INA 222(f)																			
4	Click "Submit" on the upper left-hand portion of the screen.																		
5	<p>Choose "Scheduled in Error" as a reason for the cancellation from the drop-down menu that appears as shown below:</p>  <p>Note: you may need to select a different reason to completely remove a case from EAMS, depending on the situation of the case.</p>																		
6	<p>Click "Continue" to finalize the cancellation and a pop-up will appear once it is saved. The case will now be in the Cancellation Queue.</p> <p>Note: If a Communication Error appears, please refresh the page by clicking "Calendar" on the upper left-hand portion of the screen and repeat the steps.</p>																		


Scheduling

160-040 Troubleshooting System Error

If a post has enough capacity for the month, but it has timeslots listed as “not available for this date selection” as seen below, this may be due to a system error:



Follow the procedure below to determine if you are experiencing this error.

Step	Action
1	Click  to view the calendar.
2	Select a date that has no leftover slots or re-select the same calendar date or change to a different date and reselect correct date to submit the scheduling. If every day of the month is a scheduling day, select a timeslot that has no available capacity and re-select the timeslot back to clear the error.

Scheduling

160-060 Scheduling Electronic Cases

Several U.S. Embassies and Consulates are part of the electronic IV application process. **Electronic Processing (EP)** means an applicant submits all forms and documents electronically to the NVC and the cases will be processed in IVIS. For example, Special Immigration Visa (SIV) cases are all EP cases, regardless of the Post

When scheduling electronic cases, you may need to take additional steps from those used to schedule conventional PIVOT cases.

Mandatory electronic processing:

Step	Action
1	Run Appointment Post Pull Report (NUMS) per 160-086 .
2	Place in verification folder.
3	Once Post is verified, email the PDF version of the Appointment Post Pull Report per the Scheduling Templates manual to "Packet 4" distribution list and Cc: Packet 4 per 170-040 step #2.
4	Generate the EP Pull List per 160-087 .
5	Generate the Post Supplements for GUZ per 180-020 .
6	Once NUMS have been generated, send the EP Pull List to "EP Pull List" per 160-087 .

Scheduling

160-070 Scheduling SIV Cases

SIV cases are Immediate Relative cases under the visa categories of SQ.

Refer to Post Instructions for post you are scheduling to determine if the post has any specific instruction for scheduling SQ cases. If there is no SIV capacity provided and the applicants' nationalities are AFGH, then use the Immediate Relative scheduling capacity provided. Scheduling SQ's should be prioritized whenever possible.

After scheduling SIV cases:

Step	Action
1	Run the " EP Scheduled Cases " Report per 160-087 .
2	Include the email template under module 120-080 SIV Scheduling from the Scheduling Emails Template Manual into the body of the scheduling draft. This addition should be placed underneath the IV portion and just above the DV portion.

Scheduling

160-080 Self-Verification

The **Self-Verification** stage is a crucial part of the scheduling process and must be accurately completed after each post has been scheduled.

During this stage, verify each case to ensure:

- Scheduled Cases are present in EAMS Exported Applicant List
- NUMS are generated for all IVIS scheduled cases.
- EP Pull List are generated for all IVIS EP scheduled cases.

160-081 EAMS Exported Applicant List

To obtain the list of applicants that are scheduled in EAMS for self-verification, follow the procedure below.

Step	Action
1	<p>Export your applicant list from EAMS.</p> <ol style="list-style-type: none">1. Go to the Week Tab.2. Select the Applicants.3. Click Export.4. Select OK, rename the file, and save the file to your verification folder. <p>Rename file example: <i>If you are scheduling the first round of April 2022 for Mumbai, India, you can name your document, "BMB APR 22 R1".</i></p>

Scheduling

160-082 Packet 4 Reports/NUMS (IVIS)

If you schedule an IVIS case in EAMS, you will have NUMS to generate.

The Appointment Post Pull Report is a list of all IVIS cases we scheduled for a specific post. We must send the results from the Appointment Post Pull Report to Outgoing Mail Management for the Interview Letters (Packet 4) to be generated and sent to the applicants.

Follow the procedure below to generate the Appointment Post Pull Report.

Step	Action
1	<ol style="list-style-type: none">1. Click the Packet Control > Packet 4 Reports > Appointment Post Pull Report (NUMS).2. Post Codes: Choose your Post from the drop-down list.3. Date Range: Choose Interview Scheduled Date.4. Interview Schedule Date Range/Start Date: Enter the first day you scheduled on the calendar.5. Sort by: Choose Case Number and select OK.
2	<p>Scroll to the bottom. The number on the bottom should match the case count on the EAMS Exported Applicant List Report.</p> <ul style="list-style-type: none">• If it does match, print the NUMS to ADOBE and save as "POST NUMS". Continue with scheduling procedures. <p>If it does not match, you must troubleshoot. If you just completed scheduling, EAMS might need more time to communicate with IVIS. Continue scheduling, and return to complete verification.</p>
3	<p>You can also double-check the EAMS Active Action Codes report.</p> <ul style="list-style-type: none">• If a case has an active action code, it will not appear on the NUMS.• If after trying the methods above, your NUMS still do not match, run the Interview Scheduled Date report.• Create an Excel spreadsheet and sort the case numbers from A > Z. Then copy the Case Number column into a new column in your Applicant List spreadsheet.• Select both case number columns, apply conditional formatting, highlight cells rules, and select Duplicate Values. This will show any cases that do not match. <p>Enter the case into IVIS and determine why it is not appearing in the NUMS.</p>
4	<p>Some visa symbol types (i.e.. EB5: I5, R5, C5, T5) may not show up on the NUMS once scheduled and must be entered manually:</p> <ul style="list-style-type: none">• Open PDF file of the NUMS and click "enable all features"• Click "Fill & Sign" under "Find Tools"• Edit accordingly
5	<p>Once your NUMS match, save them into the Verification Folder.</p>

Scheduling

160-083 EP Scheduled Cases Report (IVIS)

If you schedule an IVIS case with an “N” indicator in the **EP Delete IND** column, it means that the IVIS case is processing electronically (EP). The IVIS case will have an **EP Pull List** to be generated.

The EP Scheduled Cases Report identifies only the electronic cases we scheduled for a particular post. It can be generated and used for various tasks.

To generate the **EP Scheduled Cases Report**, follow these steps:

Step	Action
1	Open the Mgt Report application.
2	Select “Reports.”
3	Select the “SCHED” Report Area.
4	In the Reports field, double click “EP Scheduled Cases.”
5	Enter the date range (should be the interview dates), ranging from 1 st day of the month to the last day.
6	Select the post code.
7	Double click “EP Scheduled Cases.”
8	Create Excel.
9	Sort the cases by “EP Delete IND.”
10	In IVIS, verify any of the cases with a “Y” in the EP Delete IND column. Make sure they are, in fact, processing by physical mail. If they <i>are</i> processing by physical mail, delete the case from the list. Note: <i>If you are working on an EP only post, the EP Scheduled Cases Report must match the live run. If a case is missing, send an email to NVCPPost indicating the case that is missing the EP action code.</i>
11	Some posts require pull lists to be separated by visa symbol. To do so: <ul style="list-style-type: none">• Highlight row 1• Apply filter• Filter by visa symbols needed• Cut all visa symbols needed• Spread onto a new spreadsheet
12	Save the file as POST Pull List DD-MON-YYYY (e.g. MTL Pull List 01-MAR-2013) in your My Documents folder.
13	Send the Electronic Pull List to the “EP Pull List” distribution list. Use the “ Electronic Pull List ” email template from the Scheduling Email Templates Manual to draft the email. Note: <i>You must upload the Post supplements before sending the pull list.</i>
14	Delete the document from your My Documents folder after you send the email.

Scheduling

160-100 Scheduling/Backlog Email

After scheduling and self-verification, the total applicants scheduled, and the backlog totals must be determined for communication purposes. Refer to [Scheduling Emails Template Manual](#) for selecting the most appropriate templates based on the following:

- If the scheduling is done during 1st Round or 2nd Round (after receiving Final Action Dates)
- If the scheduling results in a backlog or no backlog
- If there is scheduling during each round or no scheduling, due to no capacity provided or no leftover

Once the template is determined, follow the procedure below to calculate the total applicants scheduled.

Step	Action
1	Open the EAMS Exported applicants list .
2.	Select/Highlight the case ID column. Make note of the total count. This will be the total of applicants scheduled for the month.
3	Edit the spreadsheet by Source and Visa Class : <ul style="list-style-type: none">• Un-check PIVOT and select IR visa classes to count scheduled IVIS IR applicants• Un-check PIVOT and select P visa classes to count scheduled IVIS P applicants• Un-check PIVOT and select E visa classes to count scheduled IVIS E applicants• Un-check IVIS and select IR visa classes to count scheduled PIVOT IR applicants• Un-check IVIS and select P visa classes to count scheduled PIVOT P applicants <p>Note: Subtract 1 to account for the column header.</p>
4	Enter the scheduled numbers under their appropriate columns in the scheduling email.
5	Save the draft and tag it with your assigned color.

Follow the procedure below to calculate the total Immediate Relative and SIV/applicants in the backlog.

Scheduling

160-100A Scheduling/Backlog Email (Continued)

Procedure to calculate the total Immediate Relative and SIV/applicants in the backlog.

Step	Action
1	Open the Scheduling Inventory Dashboard .
2	Filter the page to display only the post you are reviewing and comparing.
3	Filter the Pref Category to IR for Immediate Relative and adjust the filter to SQ to count SIVs.
4	Note the amount by System under Applicant Count by System . <ul style="list-style-type: none"> The backlog should be entered a business day after the scheduling is done, so the Dashboard can be updated. If there is a newly qualified case, you will treat it as "missing" at the time of scheduling

Follow the procedure below to calculate the total Preference applicants in the backlog.

STEP	ACTION
1	Open the Scheduling Inventory Dashboard .
2	Filter the page to display only the post you are reviewing and comparing.
3	Filter the Pref Category to Pref .
4	Filter the Final Action Date to Curr by FAD .
5	Filter the Allocated to Allocated .
6	Note the amount by System under Applicant Count by System . <ul style="list-style-type: none"> The backlog should be entered a business day after the scheduling is done, so the Dashboard can be updated.
7	Note the amount of Employment backlog by selecting specific Visa Class

The scheduling/backlog email will be sent after review by a CSA or Supervisor.

Scheduling

160-120 Regional Spreadsheet Update

Once a scheduling email is created and the scheduling numbers are determined, the **Regional Spreadsheet** must be updated.

Follow the procedure below to update the spreadsheet.

STEP	ACTION
1	Open the Monthly Regional spreadsheet .
2	Update the Scheduled column with your initial and start/completion date per Post and Round.
3	Update the Email Drafted column with your initial and start/completion date per Post and Round.
4	Update the Scheduled IVIS and PIVOT IR/P/EMPLOY columns with the total applicants scheduled for each column.
5	Update the Backlog IVIS and PIVOT IR/P/EMPLOY columns with the total applicant backlog for each column.
6	Update the SIV columns with the appropriate information: <ul style="list-style-type: none">• SIV Capacity Added: When Post provides specific SIV capacity• SIV (SQ) Scheduled: Any SQ applicants scheduled• SIV (SQ) Backlog: Any SQ applicants not scheduled in the backlog
7	Insert any appropriate comments under Comments column: <ul style="list-style-type: none">• If Post is not scheduling, any reason provided, and when the notification is received• If any cases are missing while scheduling that would help the verifier• If adjustments occur during scheduling• If a timeslot goes over the provided capacity to fit all related applicants

Scheduling

160-998 Revision History

The following manual revisions include changes to this module:

[R040-28APR2022](#) • [R039-01APR2022](#) • [R037-24MAR2020](#) • [R027-29NOV2016](#) • [R025-26OCT2016](#) • [R023-01AUG2016](#) • [R022-26MAY2016](#) • [R019-20JAN2016](#) • [R018-10DEC2015](#) • [R015-20MAY2015](#) • [R010-26DEC2014](#) • [R009-11DEC2014](#) • [R008-29OCT2014](#) • [R006 28FEB2014](#) • [R004 24JAN2014](#)

Post Supplements

180 Post Supplements

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180-010 Overview

Post supplements provide a case summary for each traveling applicant on a case. Mail Out prints the supplements and attaches them to the petitions prior to sending them to post. Posts use these supplements to organize the interview process.

Scheduling is responsible for generating and uploading post supplements for GUZ only. We upload the post supplements to eDP, as applicable. Follow the procedures below to generate the post supplements for EP cases.

Post Supplements

180-020 Generating Post Supplements

We generate post supplements for EP cases only. Follow the procedure below to generate post supplements.

Step	Action
1	Open Packet Control IVIS.
2	Click "Packet Control."
3	Click "Packet 4 Reports."
4	Click "Post Supplement."
5	Select the post whose supplement you want to print from the "Start" dropdown. Enter same post from "End" dropdown.
6	Each post supplement should be uploaded per interview date. Under "Interview Date Range," enter the date for which the interview will take place under Start Date. End Date should be the following date.
7	Select "Interview Date" under the "Sort By" option (if not already selected).
8	Enter the same case number under "Start" and "End".
9	Click "OK."
10	Verify that the total number of pages matches the number of electronic applicants scheduled for that day. Compare to the IVIS NUMS if needed. <ul style="list-style-type: none">• If they do not match, see a Team Leader or Unit Manager.
11	Set your printer to Adobe PDF.
12	Click "Print."
13	Rename the file as the specific case number (example: GUZ2022123456 Post Supplements).
14	Save the document to your desktop. Note: <i>Delete the document after you upload the supplement to eDP.</i>
15	Repeat steps 5-14 for each applicable case.

Post Supplements

180-040 Uploading Post Supplements to eDP

Note: eDP Post Supplements *MUST* be uploaded before sending the pull list. Once the data file leaves NVC, post cannot see changes made in eDP.

After each round of scheduling, a VPS will run the EP Scheduled Cases Report according to section [240-180](#). This will identify electronically processed cases. From this list, the VPS will upload all applicable post supplements for accompanying applicants on the case and send the pull list. Upload post supplements to eDP according to the procedures in this module.

If you are assigned to this task, always verify the post instructions to determine if you need to upload to eDP.

180-060 How to Log In to eDP



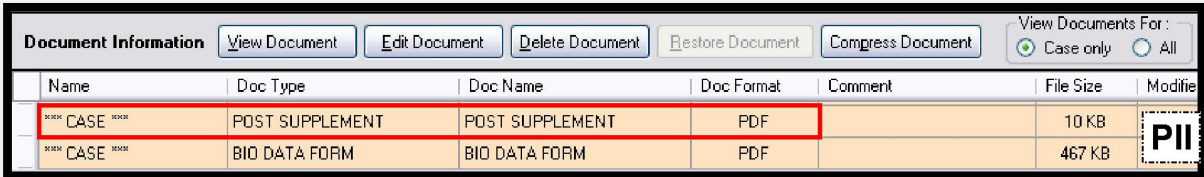
Follow the procedure below to log in to eDP.

Step	Action
1	Click "Start" then "All Programs" then "EDP – Electronic Document Processing."
2	Enter your IVIS username and password into the eDP client.

Post Supplements

180-070 How to Attach Documents in eDP

Follow the procedure below to attach a document in eDP.

Step	Action
1	Enter the case number in the Case/Receipt Number field.
2	Click "Search."
3	<p>Once the search is complete, select the case and click "View Case Document."</p> <p>Result: <i>This opens the case documents screen.</i></p> 
4	<p>Select the case number in the Case/Beneficiary/Receipt # column.</p> <p>Note: <i>This will add your attachment to the case level, which is where you need to upload post supplements.</i></p> 
5	<p>Click "Attach Document."</p> <p>Result: <i>eDP opens the Attach Document Form window.</i></p>
6	Click "Browse" and select the file you want to attach.
7	Change the document type to: Post Supplement.
8	Click "Attach Document."
9	Click "OK" in response to the confirmation prompt.
10	<p>Click "OK" in response to the Attach Document Form dialog box.</p> <p>Result: <i>The file is loaded to the Document Information Section in eDP.</i></p> 
11	Close the case.

IMPORTANT: You can upload one single PDF that contains all the traveling applicants' post supplements.

Post Supplements

180-998 Revision History

The following manual revisions include changes to this module:

[R039-01APR2022](#) • [R026-14NOV2016](#) • [R023-01AUG2016](#) • [R021-21APR2015](#) • [R015-20MAY2015](#) • [R005
26FEB2014](#) • [R004 24JAN2014](#)

PII