CHAPTER 7: PEOPLE

*Defense Travel Administrators (DTAs) use the People tool in the Defense Travel System (DTS) to manage the personal information of people assigned to their organizations. Using this tool, DTAs update personal profiles and create profiles for new DTS people. They can schedule deletion of people, detach people, or receive people into organizations they have access to.

* Defense Travel Administrators (DTAs) in this chapter are referenced as “you”.

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7.1 Types of DTS Profiles
Each person who uses DTS or has travel documents created in the system must have a DTS profile. When creating a profile for a person in DTS, you must identify which type of profile the person needs. Table 1 describes the two types of DTS profiles: user and user/traveler.

Table 7-1: DTS Profile Types

<table>
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<th>DTS PROFILE TYPES</th>
<th>USER PROFILE</th>
<th>USER/TRAVELER PROFILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>The person travels on DoD business</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>DTS role</td>
<td>• Non-DTS Entry Agent (NDEA) • Travel clerk • DTA • Routing Official • Transportation Officer (TO) • Centrally Billed Account (CBA) Specialist</td>
<td>• Anyone who travels on official DoD business • May also have a DTS role such as NDEA, travel clerk, DTA, Routing Official, TO, or CBA Specialist</td>
</tr>
<tr>
<td>DTS actions</td>
<td>• Perform administrative tasks • Create travel documents for other people</td>
<td>• Create travel documents for themselves • May also create travel documents for other people and perform administrative tasks</td>
</tr>
<tr>
<td>Required Information</td>
<td>Minimal for DTS to: • Validate identity, permissions, and access</td>
<td>Extensive for DTS to: • Validate identity, permissions and access • Capture information to automatically complete travel documents</td>
</tr>
</tbody>
</table>

7.1.1 Personal Information Protection and Access Points
To safeguard personal data in the system, and to comply with requirements of the Privacy Act, DTS limits access according to permission level(s). You should determine the role(s) and permission level(s) each person needs to accomplish their duties. Prior to entering data in the personal profile, you should identify the person’s organization membership and group membership (if Global Group Membership Rules [GGMRs] are not in place), and any requirements for organization access or group access.

7.2 Methods of Entering Personal Information
You may use either method shown below to enter new profiles in the DTS database:

- Add personal information manually
- Complete DTS Self-Registration

Once the individual’s personal information is in DTS, and they have a valid CAC, they can log in to DTS and begin using it according to their permission level(s). New users should check their personal profiles when logging in to DTS for the first time to verify their personal information is accurate. All users may access their personal profiles from the DTS User Welcome screen by selecting Traveler Setup > Update Personal Profile.

When a new document is created, the traveler’s information in the personal profile will load into the document. When changes are made to traveler information from the travel document, changes will only save to the personal profile in the DTA Maintenance Tool if the Save changes to permanent traveler
information box is checked. Leaving the box unchecked alters traveler information on the open document without changing the personal profile. For example, if a mailing address is different for only one voucher, the person may change it on the voucher without changing their permanent profile.

You must update restricted fields in the profile for users who do not have access because of their permission level(s). You are responsible for maintaining current and accurate profile information.

### 7.2.1 Add Personal Information Manually

A new user is a person who has no profile in DTS. When adding a new user to an organization, you can manually create a profile for that person. You will use the Create Person link to enter the below data for each individual:

- Personal information
- Organization of membership
- Routing information
- Permission level(s)
- Organization access
- Group access
- Financial account numbers (Government Travel Charge Card)
- Other information, as required

This manual process is explained in Section 7.4. Because this method is time consuming for making multiple entries, it is recommended only for small organization changes and individual additions.

### 7.2.2 Self-Registration

New users who have not been entered in DTS, can self-register upon their first log in to DTS. After they complete their personal information and travel preferences, they submit their self-registrations to you for review. After you have accepted the self-registrations, they will be able to log in to DTS.

### 7.3 The DTA Maintenance Tool and People

Access the DTA Maintenance Tool by selecting the Administrative drop-down list from the DTS User Welcome screen. The DTA Maintenance Home page opens. This screen displays the tools that your permission levels allow you to access. The DTA Tools drop-down list appears on every screen in the DTA Maintenance Tool. It allows you to move easily from task to task.

To perform administrative tasks related to people, select **People** from the DTA Tools drop-down list (Figure 7-1).
7.3.1 Search for People

To update information in an existing profile, search for the person's profile in DTS. The Search People screen opens (Figure 7-2) as a default each time you access the People module from the DTA Tools drop down list. There are four links on the dark blue navigation bar: Search People, Create Person, Receive Person, and View Person Lists.

The Search People screen allows you to search for current users or user/travelers in DTS.
Follow the steps below to search for a person:

The highest organization the you have access to appears by default in the organization name field.

1. If necessary, enter four or more characters in the **Organization Name** field to display a list of available organizations you can select (Figure 7-3).

![Figure 7-3: Search Organization Name Prompt](image)

2. (Optional) Check the **Include Sub-O rganizations** box to include all suborganizations.

3. Select the **Person Type** drop-down list and select a **value** from the list (Figure 7-4).

![Figure 7-4: Person Type Drop-Down List](image)

The default value in the Person Type list is **All**. If **All** is selected, both users and user/travelers are returned in the search results. Search all types, or limit the search to one type of profile.
Organization Name and Person Type are the only mandatory fields on the Search People screen. You may complete any of the other fields to refine your search and limit the search results to people who meet certain criteria. See Table 7-2 for a description of the Search People screen.

Table 7-2: Search People Screen Description

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name*</td>
<td>Field to enter the name of the organization to search for people. Value defaults to the highest organization that you can access.</td>
</tr>
<tr>
<td>Include Sub-Organizations</td>
<td>Check if you want suborganizations included in your search.</td>
</tr>
<tr>
<td>Person Type*</td>
<td>Drop-down list to select the person type to be included in the search.</td>
</tr>
<tr>
<td>SSN</td>
<td>Enter a Social Security Number to search for a specific person.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Type all or part of a person’s last name to narrow your search.</td>
</tr>
<tr>
<td>First Name</td>
<td>Type all or part of a person’s first name to narrow your search.</td>
</tr>
<tr>
<td>Organization Access</td>
<td>Drop-down list to limit the search results to people with access to a specific organization.</td>
</tr>
<tr>
<td>Permission Level</td>
<td>Drop-down list to limit the search results to people with a specific permission level.</td>
</tr>
</tbody>
</table>

*Required field

Select **Search**.
The People (Search Results) screen returns the names of all the people who meet the search criteria (Figure 7-5).

The People (Search Results) screen displays buttons that you may use to view and update the profile for each person in the list. You may use this screen to perform the below:

- Update, detach, and schedule personal profiles for deletion
- View the names of the groups of which each person is a member
- View the names of each person's dependents
7.3.2 Update Personal Profiles

You can make changes to existing information in DTS personal profiles. You can also change the profile type. However, changing a profile type causes certain automatic changes in the system. For example, if you change a person’s profile from a user/traveler to a user, DTS will discard all the information associated with the person as a traveler (e.g., General Travel, Personal Duty Station, User Defined, GTCC, and electronic funds transfer [EFT] information). A pop-up warning displays when selecting this change (Figure 7-6).

To update a personal profile, first search for the person by following the steps in Section 7.3.1. When the People (Search Results) screen opens (Figure 7-5), locate the name of the person whose profile you are updating.

Follow the steps below to update a personal profile:

1. Select Update next to the person's name.

The Update Person screen opens (Figure 7-7). This screen identifies the person by SSN.

If the person will travel on DoD official business, select the Yes radio button for the question “Is this person going to travel?” If the person will not travel on DoD business, select No.

2. Select Continue.

The personal profile opens. This screen separates the data fields into sections. A user profile has only two sections:
7.3.2.1 Update a Personal Profile (User Only)

Follow the steps below to update a user's personal profile:

1. Complete Steps 1 through 3 in the Search People section (Section 7.3.1) to locate the person’s profile to update.

The People (Search Results) screen opens (Figure 7-5).

2. Select Update to the left of the correct person’s name.

The Update Person screen opens (Figure 7-7).

3. Select the No radio button next to the question: Is this person going to travel?

4. Select Continue.

The Update Person (User Only) screen opens.

5. Modify the Common Data section fields (Figure 7-8).

Figure 7-8: Update Person (User Only) Screen - Common Data Section
6. Modify the **User Specific Data** section fields (Figure 7-9).

![User Specific Data](image)

Figure 7-9: Update Person (User Only) Screen - User Specific Data Section
See Table 7-3 for a description of the User Specific Data fields.

### Table 7-3: Update Person (User Only) Screen Description - User Specific Data Section

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization*</td>
<td>Gives the person access to the named organization.</td>
</tr>
</tbody>
</table>
| Group Access (Two drop-downs with values that are related) | **Organization Owner Name**: Field used to enter the organization owner name. This field drives which groups are available in the Group Name field.  
**Group Name**: Field used to select the group (if any) the person will belong to. |
| Non-editable Permission Level(s)*          | Permission level(s) given by a higher-level DTA that you can not change.                                                                     |
| Editable Permission Level(s)*              | Permission level(s) you can grant to the person.                                                                                             |
| Approval Override*                         | Yes and No radio buttons that indicates if the person has the authority to approve documents without being on a document's routing list. You must have permission level 7 to grant approval override. |
| Manually Entered Transaction*              | Yes and No radio buttons that indicate if a Budget Official can insert an adjustment transaction into the budget.                           |
| Non DTS Entry Agent (T-Entered)*          | Yes and No radio buttons that indicate if the person can sign vouchers on behalf of travelers.                                                |
| Debt Management Monitor*                   | Yes and No radio buttons that indicate if the person is an administrator responsible for tracking DUE U.S. documents and monitoring collection actions for their organization. |
| DTA's BI and Reporting Tool Access         | All profiles are set to Yes.                                                                                                                  |
| BI Advanced Reporting Access*              | Yes and No radio buttons that indicate if the person has BI and Reporting Tool Access.                                                        |
| User ID                                    | This field initially displays the word DEFAULT, and then updates to the person's User ID when they log in to DTS for the first time.          |

*Required field

7. Select **Save Changes**.
7.3.2.2 Update a Personal Profile (User/Traveler)

Follow the steps below to update a user/traveler profile:

1. Complete Steps 1 through 3 in the Search People section (Section 7.3.1) to locate the person's profile to update.

The People (Search Results) screen opens (Figure 7-5).

2. Select **Update** to the left of the person's name.

The Update Person screen opens (Figure 7-7).

3. Select the **Yes** radio button next to the question: *Is this person going to travel?*

4. Select **Continue**.

The Update Person (User/Traveler) screen opens.

5. Modify any fields in the **Common Data** section(Figure 7-10).

![Common Data](image)

**Figure 7-10: Update Person (User/Traveler) Screen - Common Data Section**

6. Modify fields in the **User Specific Data** section (Figure 7-11).
See the corresponding table after each figure for a description of its fields and requirements.

Figure 7-11: Update Person (User/Traveler) Screen - User Specific Data Section
Table 7-4: Update Person (User/Traveler) Screen Description-User Specific Data Section

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization*</td>
<td>Gives the person access to the named organization.</td>
</tr>
</tbody>
</table>
| Group Access (Two drop-downs with values that are related) | **Organization Owner Name**: Field used to enter the organization owner name. This field drives which groups are available in the Group Name field.  
**Group Name**: Field used to select the group (if any) the person will have access to. |
| Non-editable Permission Level(s)*    | Permission level(s) given by a higher-level DTA that the servicing DTA can not change.                                                      |
| Editable Permission Level(s)*        | Permission level(s) you can grant to the person.                                                                                           |
| Approval Override*                   | Yes and No radio buttons that indicates if the person has the authority to approve documents without being on a document’s routing list. You must have permission level 7 to grant approval override. |
| Manually Entered Transaction*        | Yes and No radio buttons that indicate if a Budget Official can insert an adjustment transaction into the budget.                           |
| Non DTS Entry Agent (T-Entered)*     | Yes and No radio buttons that indicate if the person has been authorized to sign vouchers for travelers.                                      |
| Debt Management Monitor*             | Yes and No radio buttons. You will indicate if the person is an administrator responsible for tracking DUE U.S. documents and monitoring collection actions for their organization. |
| DTA’s BI and Reporting Tool Access   | All profiles are set to Yes                                                                                                                  |
| BI and Reporting Tool Access*        | Yes and No radio buttons that indicate if the person has BI and Reporting Tool Access.                                                       |
| Self-AO Approval*                    | Yes and No radio buttons used to grant people authority to approve their own authorizations. The Self-AO must be included on a routing list. |
| User ID                              | This field initially displays the word DEFAULT, and then updates to the person’s User ID when they log in to DTS for the first time.             |

*Required field
7. Modify the **General Traveler Data** section fields (Figure 7-12).

![General Traveler Data screenshot](image)

**Figure 7-12: Update Person (User/Traveler) Screen - General Traveler Data Section**

**Table 7-5: Update Person (User/Traveler) Screen Description - General Traveler Data Section**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civilian/Military*</td>
<td>Drop-down list to identify the status of the traveler.</td>
</tr>
<tr>
<td>Title/Rank*</td>
<td>Drop-down list of civilian pay grades and military ranks. Options displayed depend on the selection in the above field.</td>
</tr>
<tr>
<td>Active/Reserve Category*</td>
<td>Drop-down list displays status for uniformed members.</td>
</tr>
<tr>
<td>Military Branch of Service*</td>
<td>Drop-down list displays available branches of the military.</td>
</tr>
<tr>
<td>Reserve Code</td>
<td>Drop-down list displays available reserve codes.</td>
</tr>
<tr>
<td>Mailing Address Line 1*</td>
<td>Enter the traveler’s mailing address.</td>
</tr>
<tr>
<td>Mailing Address Line 2</td>
<td>A second line is available if needed for the mailing address.</td>
</tr>
<tr>
<td>City*</td>
<td>Enter the city for the traveler’s mailing address.</td>
</tr>
<tr>
<td>State/Country*</td>
<td>Type the two letter code for the state or use the Lookup button to open Search State/Country Code.</td>
</tr>
<tr>
<td>Zip/Postal Code*</td>
<td>Enter the 5 digit zip code for the city.</td>
</tr>
<tr>
<td>Is mailing address same as residential address?</td>
<td>Radio button that identifies that the mailing address is the same as the residential address. The residential address is populated with the mailing address when you select Yes.</td>
</tr>
<tr>
<td>Routing List Name*</td>
<td>Identifies the default routing list for the traveler.</td>
</tr>
<tr>
<td>Default LOA Label</td>
<td>Identifies the default Line of Accounting (LOA) for the traveler.</td>
</tr>
</tbody>
</table>

* Required field
8. Modify the **Personal Data** section fields (Figure 7-13).

![Figure 7-13: Update Person (User/Traveler) Screen - Personal Data Section](image_url)

Table 7-6: Update Person (User/Traveler) Screen Description - Personal Data Section

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender*</td>
<td>Drop-down list to select the user/traveler’s gender.</td>
</tr>
<tr>
<td>Resident Address Line 1</td>
<td>Enter the traveler’s residence address.</td>
</tr>
<tr>
<td>Resident Address Line 2</td>
<td>A second line is available if needed for the residence address.</td>
</tr>
<tr>
<td>Resident City</td>
<td>Enter the city for the traveler’s residence address.</td>
</tr>
<tr>
<td>Resident State / Country</td>
<td>Type the two letter code for the state or use the Lookup button to open Search</td>
</tr>
<tr>
<td>Resident ZIP/ Postal Code</td>
<td>Enter the 5 digit zip code for the city.</td>
</tr>
<tr>
<td>Resident Phone Number*</td>
<td>Enter the telephone number of the traveler’s residence.</td>
</tr>
<tr>
<td>Emergency Contact Name*</td>
<td>Enter the name of the traveler’s emergency contact person.</td>
</tr>
<tr>
<td>Emergency Contact Phone Number*</td>
<td>Enter the telephone number for the traveler’s emergency contact person.</td>
</tr>
</tbody>
</table>

*Required field
9. Modify the **Duty Station Data** section fields (Figure 7-14).

![Duty Station Data Screen](image)

**Figure 7-14: Update Person (User/Traveler) Screen - Duty Station Data Section**
Table 7-7: Update Person (User/Traveler) Screen Description - Duty Station Data Section

<table>
<thead>
<tr>
<th>OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printed Organization Name</td>
<td>Enter the name of the organization as it appears in print, e.g., SUPPORT SQUADRON.</td>
</tr>
<tr>
<td>Present Duty Station Name</td>
<td>Enter the name of the user/traveler's duty station.</td>
</tr>
<tr>
<td>Service / Agency by which traveler is employed*</td>
<td>Drop-down list of all DoD service branches and agencies.</td>
</tr>
<tr>
<td>Number of Work Hours / Day</td>
<td>Enter number of hours in the user/traveler’s typical workday.</td>
</tr>
<tr>
<td>Time Zone*</td>
<td>Drop-down list to select the duty station time zone.</td>
</tr>
<tr>
<td>Duty Station Address*</td>
<td>Enter the traveler’s duty station address.</td>
</tr>
<tr>
<td>Duty Station City*</td>
<td>Enter the traveler’s duty station city.</td>
</tr>
<tr>
<td>Duty Station State / Country*</td>
<td>Type the two letter code for the state or use the Lookup button to open Search State/Country Code.</td>
</tr>
<tr>
<td>Duty Station Zip / Postal Code*</td>
<td>Enter the 5 digit zip code for the city.</td>
</tr>
<tr>
<td>Mail Code</td>
<td>Enter the code that identifies the location where the user/traveler receives mail.</td>
</tr>
<tr>
<td>Duty Station Phone Number*</td>
<td>Enter the traveler’s duty station phone number.</td>
</tr>
<tr>
<td>Duty Station Fax Number</td>
<td>Enter the traveler’s duty station fax number.</td>
</tr>
<tr>
<td>Number of Miles to Closest Airport</td>
<td>Enter distance to the nearest airport.</td>
</tr>
<tr>
<td>Unit ID</td>
<td>Enter the Unit ID code.</td>
</tr>
</tbody>
</table>

*Required field

10. Modify the Other Data Elements section fields (Figure 7-15).

Figure 7-15: Update Person (User/Traveler) Screen - Other Data Elements Section
Table 7-8: Update Person (User/Traveler) Screen Description - Other Data Elements Section

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech Status*</td>
<td>Drop-down list used to authorize per diem for a dual status military technician on leave from technical employment and performing active duty outside the U.S.</td>
</tr>
<tr>
<td>Air Crew Status*</td>
<td>Drop-down list, purpose is defined by the service or agency.</td>
</tr>
</tbody>
</table>

*Required field

Note: The Air Crew Status field will be masked if the user/traveler is a civilian.

11. Modify the Government Charge Card (GOVCC) Data section fields (Figure 7-16).

Note: The Government Travel Charge Card (GTCC) is referred to as the Government Charge Card (GOVCC) in DTS.
Table 7-9: Update Person (User/Traveler) Screen Description: Government Charge Card (GOVCC) Data Section

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSA/TTR</td>
<td>Note: This field is not being used at this time and displays as read-only.</td>
</tr>
<tr>
<td>Gov’t Charge Card Holder*</td>
<td>Radio buttons will identify if the traveler has a GTCC.</td>
</tr>
<tr>
<td>Advance Authorization*</td>
<td>Drop-down list used to specify the advance type that a traveler can be authorized. You cannot update this field in your own profile.</td>
</tr>
<tr>
<td>Mandatory Use of GOVCC*</td>
<td>Radio buttons used to specify payment for air transportation. Exempt radio button defaults air transportation to CBA. Non-exempt defaults air transportation to GTCC. You cannot update this field in your own profiles.</td>
</tr>
<tr>
<td>Account Number*</td>
<td>Enter the traveler’s GTCC account number.</td>
</tr>
<tr>
<td>GOVCC Exp Date*</td>
<td>Select the traveler’s GTCC expiration date.</td>
</tr>
</tbody>
</table>

* Required field

12. Complete or update the following EFT information (Figure 7-17):
   - Checking Routing Number and Checking Account Number
   - OR-
   - Saving Routing Number and Saving Account Number.

   **Note:** You should select the No radio button only if the traveler does not have access to an account at a financial institution that can receive EFTs. If No, then the traveler must justify on each trip authorization why payments by EFT cannot be accepted.

Figure 7-17: Update Person (User/Traveler) Screen - Electronic Funds Transfer Data Section
Table 7-10: Update Person (User/Traveler) Screen Description -
Electronic Funds Transfer Data Section

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory EFT Payment*</td>
<td>Radio button identifies if EFT is being used.</td>
</tr>
<tr>
<td>Checking Routing Number</td>
<td>Personal checking account routing number.</td>
</tr>
<tr>
<td>Checking Account Number</td>
<td>Personal checking account number.</td>
</tr>
<tr>
<td>Saving Routing Number</td>
<td>Personal savings account routing number.</td>
</tr>
<tr>
<td>Saving Account Number</td>
<td>Personal savings account number.</td>
</tr>
</tbody>
</table>

*Required field

13. Select **Save Changes**.

7.3.3 Detach a Person from an Organization

When a person transfers to an organization that you do not have access to, you must detach the person. When they are detached, their profile is assigned to the None organization. The None organization is a repository of DTS profiles of people who are waiting to be received. People with detached profiles will be unable to log in to DTS until the gaining organization receives them. All organization-specific fields such as DTA ID, routing list, and default LOA in the personal profile will clear. The GGMRs that belong to the detaching organization continue to affect the detached profile until it is received into a new organization. When the person is received, some fields update automatically to the receiving organization’s default settings. The permission level will be reset to 0 and they will have no organization or group access.

To detach a person from an organization in DTS, you must first search for the person by following the steps in Section 7.3.1. When the People (Search Results) screen opens (Figure 7-18), locate the name of the person who will be detached.

![Figure 7-18: People (Search Results) Screen](image)
Follow the steps below to detach a person from an organization:

1. Select **Detach** next to the name of the person.

The Detach Person screen opens (Figure 7-19). This screen gives you the opportunity to confirm that you are about to detach the correct person. If you chose the wrong person, select **Cancel** and start over.

![Figure 7-19: Detach Person Screen](image)

2. Select **Detach Person**.

The People (Search Results) screen refreshes. The detached person’s name no longer appears on the list. This person is assigned to the None organization and is available to be received by the new organization. See Section 7.5, Receive Person.

### 7.3.4 Schedule a Personal Profile for Deletion

When you select **Delete Person** on the Delete Person screen (Figure 7-21), one of two things happen, depending on whether or not the person has active documents in DTS. See Table 7-11.

<table>
<thead>
<tr>
<th>IF THE PERSON</th>
<th>THEN DTS</th>
<th>IS THIS REVERSABLE?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has no signed documents in DTS</td>
<td>Deletes their profile immediately.</td>
<td>No.</td>
</tr>
<tr>
<td>Has signed documents in DTS</td>
<td>Schedules their profile to be deleted in 15 months.</td>
<td>Yes, but only within the 15-month period.</td>
</tr>
<tr>
<td></td>
<td>Schedules the dependents named in the profile to be deleted in 15 months.</td>
<td>Use the Receive Person procedure. See Section 7.5 of this manual.</td>
</tr>
<tr>
<td></td>
<td>Will not allow the person to log in.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Will keep their existing documents available to authorized DTS users for 15 months.</td>
<td></td>
</tr>
</tbody>
</table>
To schedule a personal profile for deletion in DTS, first search for the person by following the steps in Section 7.3.1. When the People (Search Results) screen opens (Figure 7-20), locate the name of the person whose profile you want to delete.

**Figure 7-20: People (Search Results) Screen**

Follow the steps below to delete a personal profile:

1. Select **Delete** next to the name of the person whose profile needs to be scheduled for deletion.
The Delete Person screen opens (Figure 7-21).

![Delete Person Screen](image)

Figure 7-21: Delete Person Screen

The **Delete Person** screen gives you the opportunity to confirm that you selected the correct person for deletion from the organization.

2. Select **Delete Person**.

The Search Results screen refreshes. The deleted person’s name no longer displays on the list.

### 7.3.5 View Groups

The View Groups button allows you to see all of the groups that the person belongs to. This button displays current group membership only.

1. Select **View Group(s)** next to the name of the person

The **Traveler’s Group(s) Include** screen opens (Figure 7-22).

![Traveler’s Group(s) Include Screen](image)

Figure 7-22: Traveler’s Group(s) Include Screen

The **Traveler’s Group(s) Include** screen displays the groups to which the person has been added via automatic (GGMR) and manual methods.
7.3.6 View, Add, Update, and Delete Dependent Information

You can enter dependent information through the People module of the DTA Maintenance Tool. The dependents are available for selection when a traveler/NDEA is creating a travel document. You may also edit and delete dependent information to correct errors and update as appropriate.

To view, add, or update a traveler’s dependent information in DTS, you must first search for the traveler by following the steps in Section 7.3.1. When the People (Search Results) screen opens (Figure 7-20), locate the sponsor’s name for whom dependent information needs to be added or updated.

1. Select **View Dependents** next to the sponsor’s name whose profile needs to be updated with dependent information.

The Dependents for Traveler screen opens (Figure 7-23). If the traveler has any dependent information in their profile, it will display on this screen.

![Figure 7-23: Dependents for Traveler Screen](image)

**7.3.6.1 Add Dependent Information**

Beginning on the Dependents for <Name> screen (Figure 7-23), follow the steps below to add information for a family member to the person’s profile:

1. Select **Add Family Member**.

The Add Family Member screen opens (Figure 7-24).

![Figure 7-24: Add Family Member Screen](image)
2. Complete the **First Name** field.

3. (Optional) Complete the **Middle Initial** field.

4. Complete the **Last Name** field.

5. Complete the **Date of Birth** field.

6. Select the **Relation** drop-down list and choose the relationship of this dependent to the person.

7. Complete the **Passport Number** field.

8. Complete the **Expiration Date** field. Enter the expiration date of the dependent’s passport in the format indicated.

9. Select **Save Person** (Figure 7-24).

The Dependents for Traveler screen refreshes (Figure 7-25). It displays information pertaining to the added dependent.

![Figure 7-25: Dependents for Traveler Screen (Family Member Added)](image)

### 7.3.6.2 Update Dependent Information

Beginning on the Dependents for Traveler screen, follow the steps below to update a dependent’s information in the traveler’s profile:

1. Select **Update** for the dependent whose information will be updated.
The Edit Family Member screen opens (Figure 7-26). It displays the current information for the selected dependent.

![Edit Family Member Screen](image)

Figure 7-26: Edit Family Member Screen

2. Edit any information that requires correction or update (e.g., spelling error, name change, new passport information).

3. Select **Save Changes**.

### 7.3.6.3 Delete Dependent Information

Beginning on the Dependents for Traveler screen (Figure 7-23 and Figure 7-25), follow the steps below to delete a dependent’s information from the traveler’s profile:

1. Select **Delete**.

The Delete Family Member screen opens (Figure 7-27). The current information for the selected dependent displays.

![Delete Family Member Screen](image)

Figure 7-27: Delete Family Member Screen

2. Select **Delete Family Member** (Figure 7-25).
The Dependents for Traveler screen opens (Figure 7-28). It no longer displays the deleted dependent's information.

![Dependents for Traveler Screen – Dependent Deleted](image)

**7.4 Create a Personal Profile**

Follow the steps below to create a personal profile in DTS:

1. Select **People** from the DTA Tools drop-down list on any screen in the DTA Maintenance Tool.

The Search People screen opens by default (Figure 7-2). Four links display on the navigation bar: **Search People**, **Create Person**, **Receive Person**, and **View Person Lists**.

2. Select **Create Person**.

The Create Person screen opens (Figure 7-29).

![Create Person Screen](image)

3. Complete the **SSN** field.

4. Select the **Yes** or **No** radio button to indicate whether or not the person will travel.

If **Yes** is selected, the Create Person (User/Traveler) screen will open. If **No** is selected, the Create Person (User Only) screen will open. Complete all of the steps below to create a personal profile for a user/traveler. Steps 16 through 44 do not apply when creating a profile for a person who is a user only.

5. If the person is a member of the **Reserve/National Guard**, place a check in the box.

6. Select **Continue**.
The Create Person (User Only) screen or the Create Person (User /Traveler) screen opens, depending upon the radio button selected on the previous screen (Figure 7-30).

![Create Person Screen - Common Data Section](image)

Figure 7-30: Create Person Screen - Common Data Section

7. Complete the **First Name** and **Last Name** fields. The Middle Initial field is optional.

8. Select the **Organization Name** drop-down list and choose the new person’s **organization**.

9. Complete the **Email** field.

**Note:** See Table 7-3 for a description of the User Specific Data section (Figure 7-9).

10. If the person requires organization access, enter four or more characters in the **Organization Access** field to display a list of available organizations to select from.

11. If the person requires group access, enter four or more characters in the **Organization Owner Name** field to display a list of available organizations to select from.

12. If required, select the **Group Name** drop-down list and choose the appropriate **group** from the list.

13. Check the **Editable Permission Levels** check boxes to grant the appropriate permissions to the new person.

14. Select the **Yes** or **No** radio button for Approval Override. This indicates whether or not the person can approve documents without being on a document's routing list.

15. Select the **Yes** or **No** radio button for Manually Entered Transaction. This indicates whether or not the person can use the **Manual Transaction** feature in the Budget Administration Tool.

16. Select the **Yes** or **No** radio button to indicate whether the person will be an NDEA.

17. Select the **Yes** or **No** radio button to indicate whether the person will have BI and Reporting Tool Access.

**Note:** You must have BI and Reporting Tool Access for this field to display as editable.

18. Select the **Yes** or **No** radio button for **Self AO Approval**. This indicates whether the person can approve their own authorizations. If you choose **Yes**, you will have to include the person on a routing list.
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**Note:** See Table 7-5 for a description of the General Travel Data section (Figure 7-12).

19. Select the **Civilian / Military** drop-down list and choose the correct value from the list.

20. Select the **Title / Rank** drop-down list and choose the correct value.

21. Complete the **Mailing Address, City, State / Country, and Postal Code** fields.

22. Select the **Routing List Name** drop-down list and choose the correct value.

23. Select the **Default LOA Label** drop-down list and choose the correct value.

**Note:** See Table 7-6 for a description of the Personal Data section (Figure 7-13).

24. Select the **Gender** drop-down list and choose the correct value.

25. Complete the **Resident City** field with the person's city of residence.

26. Complete the **State / Country** field. Use the **Lookup** button to search for the state or country.

27. Complete the **Resident Phone Number** field with the telephone number of the person's residence.

28. Complete the **Emergency Contact Name** field and the **Emergency Contact Phone Number** field.

**Note:** See Table 7-7 for a description of the Duty Station Data section (Figure 7-14).

29. Complete the **Printed Organization Name** field with the name of the person's organization.

30. Complete the **Present Duty Station Name** field with the name of the person's duty station.

31. Select the **Service / Agency by which the traveler is employed** drop-down list. Choose the correct value.

32. Complete the **Number of Work Hours / Day** field with the number of hours in the person's typical workday.

33. Select the **Time Zone** drop-down list. Choose the correct value.

34. Complete the **Duty Station Address** fields with person's duty station address and mail code.

35. Complete the **Duty Station Phone Number and Duty Station Fax Number** fields.

36. Complete the **Number of Miles to Closest Airport** field by entering the number of miles to the nearest airport.

37. Complete the **Unit ID** field with the person's unit ID information.

**Note:** See Table 7-8 for a description of the Other Data Elements section (Figure 7-15).

38. Select the **Tech Status** drop-down list. Choose the correct value (Air Force only).

39. Select the **Air Crew Status** drop-down list. Choose the correct value (Air Force only).

**Note:** The Air Crew Status field will be masked if the person is a civilian.
Note: See Table 7-9 for a description of the Government Charge Card (GOVCC) Data section (Figure 7-16).

40. Select either the Yes or No radio button for Gov't Charge Card Holder.

41. Select the Advance Authorization drop-down list. Choose the correct value.

42. Select either the Exempt or the Non-Exempt Mandatory Use of GOVCC radio button. This specifies default payment method for air transportation.

43. Complete the Account Number field with the GTCC number.

44. Complete the GOVCC Exp. Date fields with the expiration date.

Note: See Table 7-10 for a description of the Electronic Funds Transfer Data section (Figure 7-16).

45. Complete or update the following user/traveler information:
   Checking Routing Number and Checking Account Number
   -OR-
   Saving Routing Number and Saving Account Number.

Note: The No radio button should only be selected if the traveler does not have access to an account at a financial institution that can receive EFTs. If No, the traveler must justify on each trip authorization why payments by EFT cannot be accepted.

46. Select Save Changes.

7.5 Receive a Person

After a person has been detached, the DTA at the gaining organization must receive the person before they can log in to DTS. Travelers retain the group memberships they had while in the detaching organization until they are received into the new organization, then the new organization's GGMR(s) apply.

To receive people into an organization, you must search for the person’s personal profile in DTS. Follow the steps below to receive a person into a DTS organization:

1. Select People from the DTA Tools drop-down list on any screen in the DTA Maintenance Tool.

The Search People screen opens by default (Figure 7-2). Four links display in the navigation bar: Search People, Create Person, Receive Person, and View Person Lists.

2. Select Receive Person.
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The **Search Person to Receive** screen opens (Figure 7-31).

![Figure 7-31: Search Person to Receive Screen](image)

3. Complete the **SSN** field with the SSN of the person to be received.

4. Type the name of the organization that is receiving the person in the **Receiving Organization Name** text field.

5. Select **Search**.

The **Receive Person** screen opens (Figure 7-32). This screen displays the record of the person whose SSN matched the SSN entered in the **Search Person to Receive** screen.

![Figure 7-32: Receive Person Screen](image)

6. Select **Receive Person** to assign the person to the receiving organization.
7. The People (Search Results) screen opens (Figure 7-33).

![People (Search Results) Screen](image)

**Figure 7-33: People (Search Results) Screen**

**Note:** A person is only available to be received if that person has been detached from the original organization. If the person cannot be received for this reason, a message will display.

8. Select **Update** to assign permissions, organization access, group access, routing list (if different from the default), duty station information, and any other organization-specific information in the person's profile.

### 7.6 View Person Lists

The View Person Lists feature of DTS allows you to create lists of the following types of personal information:

- **Basic Traveler Information List.** Displays several items from a traveler's profile, including organization, unique identification number (UIN), group access, and default LOA.
- **Accounts Information List.** Displays information regarding a traveler's GOVCC and checking account (if applicable).
- **Special Features Information List.** Displays information indicating people that have special permissions, roles, or access, such as Self-AO, NDEA, and Debt Management Monitor (DMM).
- **Groups Information List.** Displays traveler names and the groups to which they belong, as well as member organizations and group organization owner names.

**Note:** The CSA status is included in all View Person Lists reports.

Follow the steps below to view a Person List:

1. Select the **DTA Tools** drop-down list and choose **People**.

The Search People screen opens (Figure 7-2).

2. Select **View Person Lists**.
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The View Person Lists screen opens (Figure 7-34).

![View Person Lists Screen](image)

3. Choose the **Select Report** drop-down list and select the **list type**.

4. Enter the organization name in the **Select Organization** text field. A drop-down list will appear if there are suborganizations attached to the selected organization. Choose the **organization** to you want included in the report.

5. Select **Run Report**.

You will be prompted to download the compiled report, which you may download to your computer or view in a separate window as an Excel spreadsheet.

6. Select **Open** to display the report on the screen (Figure 7-35).
   - **OR**-
   Select **Save** to download the file to location of your choice.

![Person List - Special Features List Example](image)
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