

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 users' personal profiles and create profiles for new DTS users. They can schedule deletion of people from their organizations, detach people from their organizations, and receive people into their organizations. This chapter covers the following topics:

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7.1 DTS Users and User/Travelers

Users and user/travelers are the two categories of people who access DTS to perform tasks related to official travel for the Department of Defense (DoD). DTS maintains information for both types.

Users are people who access DTS to perform administrative tasks. They do not travel on official DoD business. Such people include travel clerks, Non-DTS Entry Agents (NDEAs), certain DTA personnel, Transportation Officers (TOs), and Centrally Billed Account (CBA) Specialists. Because users do not travel on DoD business, their personal profiles require less personal information than user/traveler personal profiles require.

User/travelers are people who travel on official business for the DoD. They can create travel documents and have travel documents created for them in DTS. A user/traveler's personal profile stores financial account numbers, duty station information, routing lists, and other information. All user/travelers can access their own personal information from their DTS User Welcome screen or when creating a travel document. DTAs, travel clerks, and NDEAs can access the personal profiles of other people within the group to which they have access, and when creating travel documents for travelers.

The DTS database stores a user/traveler's user ID in the form of a unique identification number (UIN). The UIN is stored on the digital certificate. (See Chapter 2 of this manual for more information.)

To safeguard personal data in the system, and to comply with the requirements of the Privacy Act, DTS limits access to its capabilities according to a user's permission level(s), as described in Chapter 3 of this manual. The Organizational DTA (ODTA) should determine the role(s) and permission level(s) each user

and user/traveler needs in order to accomplish their duties. Prior to entering data in the personal profile, the DTA should identify the user's or user/traveler'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

DTAs select from the following two methods to enter new personal profiles in the DTS database:

- Add personal information manually
- Complete DTS Self-Registration

Once the personal information is in DTS, and users or user/travelers have a valid certificate, they can log in to DTS and access its features in accordance with their permission level(s). Each new user should check their personal profile when logging in to DTS for the first time to verify that the personal information is accurate. User/Travelers may access their personal profile from their DTS User Welcome screen by selecting **Traveler Setup > Update Personal Profile**. They should correct or report any errors immediately. The DTA must update restricted fields in the personal profile for certain users who do not have access because of their permission level(s). DTAs are responsible for quality control of personal information.

7.2.1 Add Personal Information Manually

A new user means a person with no record in the DTS database. When adding a new user to an organization, the DTA must manually create a personal profile for that person. DTAs use the Create Person link to enter the below data for each individual:

- Personal information
- Organization of membership
- Routing information
- Permission level(s)
- Role(s)
- Organization access
- Group access
- Financial account numbers (personal and government credit card [GOVCC])
- 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 by their DTAs can self-register upon their first log in to DTS. After the users complete their personal information and travel preferences, they submit their self-registrations to their local DTAs for review. After their self-registrations have been accepted, users can log in to DTS. See Chapter 2 of this manual for further guidance.

7.3 The DTA Maintenance Tool and People

DTAs access the DTA Maintenance Tool by selecting it from the Administrative drop-down list on their DTS User Welcome screen. The DTA Maintenance Home page opens. It is the starting point of the tool and displays the features that the DTA's permission level allows them to access. The drop-down list on the navigation bar is called DTA Tools. It appears on every screen in the DTA Maintenance Tool, allowing DTAs to move from task to task.

Management of personal information for all users and travelers in DTS is encompassed by one term: *People*. The People tool of DTS allows DTAs to create and maintain personal profiles for DTS users and users/travelers. Within DTS, a *user* is a person who has been granted access to DTS but does not travel. A *user/traveler* is a person who travels on official business for the DoD and for whom travel documents can be created. User/travelers may create their own travel documents if they have access to DTS, or have them created by someone else with access to their information. All travelers can be user/travelers if they have valid access certification. However, not all DTS users can be travelers. Roles are defined when profiles are created or updated in the DTA Maintenance Tool.

DTAs can only create and update the personal profiles to which they have access, based on the hierarchical setup within DTS. Likewise, the Search People screen limits their choices in the drop-down lists based on that access. To perform DTA tasks related to people, select **People** from the DTA Tools drop-down list (Figure 7-1).

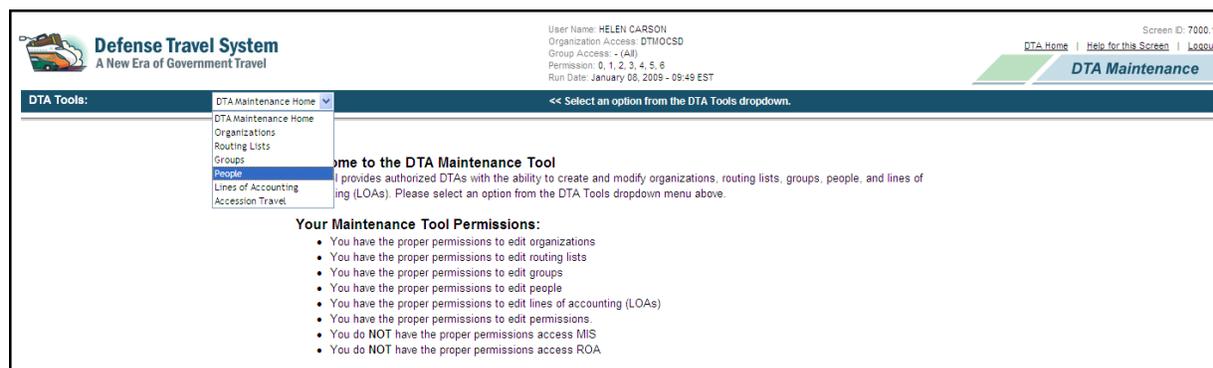


Figure 7-1: DTA Maintenance Tool Home Page

7.3.1 Search for People

In order to update a person's information, the DTA must search for that person's profile in DTS. When selecting **People** from the drop-down list, the Search People screen opens (Figure 7-2). There are four

links on the dark blue navigation bar that allow the DTA to perform tasks using the People tool: Search People, Create Person, Receive Person, and View Person Lists.

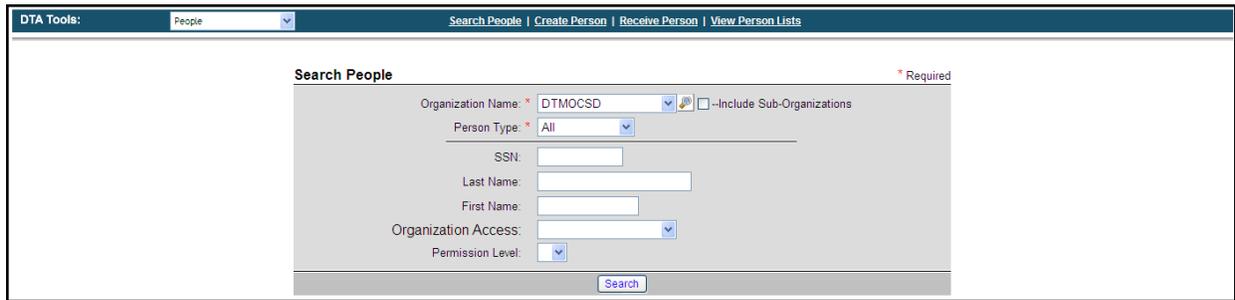


Figure 7-2: Search People Screen

The Search People screen opens by default. This screen allows DTAs to search for current users and user/travelers in DTS.

Follow these steps to search for a person:

1. Select the **Organization Name** drop-down list and choose the **organization** to search. Note the red asterisk next to the text field title. A red asterisk indicates a required field. (To search all of the organizations subordinate to the one selected, check the **Include Sub-Organizations** box.)

Note: In a long list of organization names, the magnifying glass icon can be used to quickly find an organization. After selecting the icon, enter the organization name or the first few characters, e.g., DFCWT, in the text box. Select **OK**. The organization appears in the Organization Name field. Use the drop-down arrow to continue the search if necessary (Figure 7-3).



Figure 7-3: Search Organization Name Prompt

2. Select the **Person Type** drop-down list and select a value from the list.

The default value in the Person Type list is **All** (Figure 7-4). If selected, **All** will return both users and user/travelers in the search results. Search all types, or limit the search to one type of user.

Organization Name and Person Type are the only mandatory fields on the Search People screen. DTAs may complete any of the optional fields to refine their search and limit the search results to people who meet certain criteria. See Table 7-1 for a description of the Search People screen.

3. Select **Search**.

The screenshot shows the 'Search People' interface. At the top right, there is a '* Required' indicator. The form contains the following elements:

- Organization Name:** A dropdown menu with 'DTMOCSD' selected. To its right is a checkbox labeled '-Include Sub-Organizations'.
- Person Type:** A dropdown menu with 'All' selected. A list is open below it showing 'All', 'User' (highlighted), and 'User/Traveler'.
- SSN:** A text input field.
- Last Name:** A text input field.
- First Name:** A text input field.
- Organization Access:** A dropdown menu.
- Permission Level:** A dropdown menu.
- Search:** A button at the bottom center.

Figure 7-4: Search People Screen

Table 7-1: Search People Screen Description

SEARCH PEOPLE SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
Organization Name*	Drop-down list of organizations that DTS can search for people. Value defaults to the organization to which the user has access. Users may search any organization from the list. This is a required field.
Include Sub-Organizations	Check box used to broaden the search to include suborganizations.
Person Type*	List of values for type of person to display in the search: All, User, or User/Traveler. This is a required field.
SSN	Text field to enter a user's Social Security Number (SSN) for DTS to search by SSN.
Last Name	Text field to enter all or part of a user's last name for DTS to search by last name.
First Name	Text field to enter a user's first name for DTS to search. Use in conjunction with last name field.
Organization Access	Drop-down list to limit search results to people with access to a specific organization.
Permission Level	Drop-down list to limit search results to people with a specific permission level.

The results displayed in the People (Search Results) screen is limited to people who meet the search criteria and who are within the user’s organization access (Figure 7-5).

People (Search Results)			
Organization Name: DTMOCSD		SSN:	Permission Level:
Include Sub-Organizations: No		Last Name:	Person Type: All
Organization Access:		First Name:	
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name: CARSON, CHRIS A	SSN: XXXXX2346	Organization: DTMOCSD
		Permission: 0, 1, 2	Organization Access: DTMOCSD
		Rank: MO-04	Group Access: (All)
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name: CARSON, ERIC T	SSN: XXXXX2363	Organization: DTMOCSD
		Permission: 0	Organization Access: DTMOCSD
		Rank: GS-10	Group Access: (All)
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name: Carson, Eric T	SSN: XXXXX2371	Organization: DTMOCSD
		Permission: 0	Organization Access: No Org Access
		Rank: MW-04	Group Access: (All)
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name: CARSON, HELEN D	SSN: XXXXX2378	Organization: DTMOCSD
		Permission: 0, 1, 2, 3, 4, 5, 6	Organization Access: DTMOCSD
		Rank:	Group Access: (All)
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name: Dean, Helen D	SSN: XXXXX2390	Organization: DTMOCSD
		Permission: 0, 1, 2, 3, 4, 5, 6	Organization Access: No Org Access
		Rank:	Group Access: None

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Figure 7-5: People (Search Results) Screen

The People (Search Results) screen displays options that DTAs may use to view and update the profile for each person in the list. DTAs may use this screen to perform the following:

- 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

Users and user/travelers are the two types of profiles in the People section of the Maintenance Tool. Profiles for user/travelers have several more fields to complete. If there is a change to a person's category from a user/traveler to a user, all of the information associated with the person as a traveler will be lost (e.g., General Travel, Personal Duty Station, User Defined, GOVCC, and EFT information).

Changing a profile from one type to another affects the person's GGMRs as described below:

- A user/traveler profile changed to a user profile retains the GGMR(s) the person had as a traveler
- A user profile changed to a user/traveler profile will trigger the GGMR(s) of the traveler's organization

To update a user or user/traveler's 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 needs to be updated.

Follow the below steps to update a personal profile:

1. Select **Update** next to the name of the correct person.

The Update Person screen opens (Figure 7-6). This screen identifies the selected person by SSN and allows the DTA to select whether they are going to travel.

Figure 7-6: Update Person Screen

This is the point from which the DTA can start to modify the personal profile of a DTS user or user/traveler. 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 no longer travels 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: Common Data (data associated with the person within and outside of DTS) and User-Specific Data (data that is only associated with the person as a DTS user.) A user/traveler profile has additional sections for required data. If the DTA selected the **Yes** radio button, the Update (User/Traveler) screen will open (Figure 7-10). Complete the required information in the personal profile. If **No** is selected, the Update Person (User Only) screen will open (Figure 7-8).

Note: If the DTA changes a person's category from a user/traveler to a user, all of the information associated with the person as a traveler will be lost (i.e., General Travel, Personal Duty Station, User Defined, GOVCC, and EFT). The following warning displays upon selecting the change (Figure 7-7).



Figure 7-7: Pop-up Warning That Data Will Be Lost In Profile Change

7.3.2.1 Required Personal Profile Information

Table 7-2 through Table 7-10 represent the information that is needed in each person's profile in order for DTS to function properly. Most of the information for these fields is entered into the profile during the data upload. DTAs must verify that the upload for each person was successful and must correct any errors immediately.

DTAs maintain personal information in each person's personal profile. The information is attached to documents as they are created. Changes made to traveler information under the Traveler Setup tab will automatically update the personal profile in the DTA Maintenance Tool. Changes to traveler information on a travel document will not save to the personal profile in the DTA Maintenance Tool unless the **Save changes to permanent traveler information** box is checked. This makes it possible to alter traveler information associated with one document without affecting 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 the personal profile.

Once the information is entered in the personal profile, it is available for use on future documents. When a new document is created, all of the traveler's information in the personal profile will load into the document.

7.3.2.2 Update a Personal Profile (User Only)

Use the below steps 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 7-6).

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 fields as necessary in the user personal profile: the **Common Data** section (Figure 7-8) and the **User Specific Data** section (Figure 7-9).
6. Select **Save Changes**.

See the corresponding table after each figure for a detailed description of its fields and requirements.

Note: Required fields are marked with asterisks.

The screenshot shows a web form titled "Update Person (User Only)" with a "Data Required" indicator in the top right. The "Common Data" section contains the following fields:

- SSN: XXXXX2378
- First Name: * HELEN
- Middle Initial: D
- Last Name: * CARSON
- Organization Name: * DTMOCS (with a dropdown arrow and a search icon)
- Email: email@email.pentagon.mil

Figure 7-8: Update Person (User Only) Screen - Common Data Section

Table 7-2: Update Person (User Only) Screen Description - User-Specific Data Section

UPDATE PERSON (USER ONLY) SCREEN DESCRIPTION - USER-SPECIFIC DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Organization Access*	Drop-down list that is used to set the user's access. This is a required field.
Group Access (Two drop-down lists with values that are directly related to one another.)	<i>Organization Owner Name:</i> The selected organization owner name drives which groups are available in the Group Name drop-down list.
	<i>Group Name:</i> The groups that belong to the selected organization owner name.
Non-editable Permission Level(s)	Permission level(s) given by a higher-level DTA that the servicing DTA can not change because they do not have the permission level that needs to be changed.
Editable Permission Level(s)*	Permission level(s) that the servicing DTA can change. This is a required field.
Approval Override*	Yes and No radio buttons that indicate whether or not the selected user has the authority to override documents in the system. This is a required field and only allows Yes if this person also has permission level 7. DTAs cannot update this field in their own profile.

Table 7-2: Update Person (User Only) Screen Description - User-Specific Data Section (continued)

UPDATE PERSON (USER ONLY) SCREEN DESCRIPTION - USER-SPECIFIC DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Manually Entered Transaction	Yes and No radio buttons that indicate that a Budget Official is able to insert an adjustment transaction into a budget. DTAs cannot update this field in their own profile.
Non DTS Entry Agent (T-Entered)*	Yes and No radio buttons that indicate whether or not the selected user can sign vouchers on behalf of travelers. This is a required field. DTAs cannot update this field in their own profile.
Debt Management Monitor	Yes and No radio buttons that indicate whether the selected user is an administrator (usually a Finance DTA [FDTA]) responsible for tracking DUE U.S. situations and monitoring collection actions for an organization. DTAs cannot update this field in their own profile.
User ID	Field that initially displays the word DEFAULT, and then updates to the user ID when the user logs on to DTS for the first time.

The screenshot shows the 'User Specific Data' form with the following details:

- Organization Access:** DTMOCSD
- Group Access:** DTMOCSD (Organization Owner Name), CSD (Group Name)
- Non-editable Permission Level(s):** (blank)
- Editable Permission Level(s):** 0, 1, 2, 3, 4, 5, 6 (all checked)
- Approval Override:** No
- Manually Entered Transaction:** Yes
- Non-DTS Entry Agent (T-Entered):** Yes
- Debt Management Monitor:** Yes
- User ID:** u9000007253 (with a 'Reset User ID' button)
- Buttons:** Save Changes, Cancel

Figure 7-9: Update Person (User Only) Screen - User-Specific Data Section

7.3.2.3 Update Person (User/Traveler)

Use the below steps to update a user/traveler’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 7-6).

3. Select the **Yes** radio button next to the question: *Is this person going to travel?*
4. Select **Continue**.
5. Modify the **Common Data** section fields (Figure 7-10).

See the corresponding table after each figure for a description of its fields and requirements.

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

Table 7-3: Update Person (User/Traveler) Screen Description - Common Data Section

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - COMMON DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
SSN	Non-editable field showing the last four digits of the traveler's SSN.
Name Fields*	Text fields to enter or edit first name, middle initial, and last name. The asterisks (*) indicate that the first and last name are required fields.
Organization Name*	Drop-down list that defaults to the traveler's organization of membership. The asterisk (*) means that this is a required field.
Email*	Text field to enter user/traveler's e-mail address: travelname@domain.extension.

6. Modify the **User-Specific Data** section fields (Figure 7-11).

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

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - USER-SPECIFIC DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Organization Access*	Drop-down list that is used to set the traveler's access. This is a required field.
Group Access (Two drop-down lists with values that are directly related to one another.)	<i>Organization Owner Name</i> : The selected organization owner name will drive which groups will be available in the Group Name drop-down list.
	<i>Group Name</i> : The groups that belong to the selected organization owner name.
Non-editable Permission Level(s)	Permission level(s) given by a higher-level DTA that the servicing DTA can not change because they do not have the permission level that needs to be changed.
Editable Permission Level(s)*	Permission level(s) that the servicing DTA can change. This is a required field.
Approval Override*	Yes and No radio buttons that indicate whether or not the selected user has the authority to override documents in the system. This is a required field. DTAs cannot update this field in their own profile.
Manually Entered Transaction	Yes and No radio buttons that indicates that a budget official is able to insert an adjustment transaction into a budget. DTAs cannot update this field in their own profile.
Non DTS Entry Agent (T-Entered)*	Yes and No radio buttons that indicate whether or not the selected user can sign vouchers on behalf of travelers. This is a required field. DTAs cannot update this field in their own profile.
Debt Management Monitor	Yes and No radio buttons that indicate whether the selected user is an administrator (usually an FDTA) responsible for tracking DUE U.S. situations and monitoring collection actions for an organization. DTAs cannot update this field in their own profile.

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

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - USER-SPECIFIC DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Self-AO Approval	Radio button used to grant user/travelers authority to approve their own authorizations. This is a required field. DTAs cannot update this field in their own profile.
User ID	Field that initially displays the user's SSN and updates to the user ID when the user logs in to DTS for the first time.

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

The screenshot shows the 'General Traveler Data' section of a web form. It contains the following fields and values:

- Civilian / Military: * C - Civilian (dropdown)
- Title / Rank: * GM-14 (dropdown)
- Mailing Address Line 1: * 123 Oakwood Drive (text)
- Mailing Address Line 2: (text)
- City: * King George (text)
- State / Country: * VA (text) with a 'Lookup' button
- Zip / Postal Code: * 22485 (text)
- Is mailing address same as residential address?: Yes No
- Routing List Name: * CSD (dropdown)
- Default LOA Label: 09 CONFERENCE (dropdown)

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

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - GENERAL TRAVELER DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Civilian / Military*	Drop-down list to select type of duty. This is a required field.
Title / Rank*	Drop-down list of civilian and military ranks and pay grades. Options displayed depend on the value selected for Civilian / Military field. This is a required field.
Active / Reserve Category*	Drop-down list of uniformed member status. This field becomes available and required if Enlisted or Officer is selected in Civilian / Military field.
Military Branch of Service*	Drop-down list of available branches of service. This is a required field.
Reserve Code	Drop-down list of available reserve codes.
Mailing Address Line 1*	Text field to enter mailing address.
Mailing Address Line 2	Text field for second line, if necessary for mailing address.

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

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - GENERAL TRAVELER DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
City*	Text field to enter name of the city in the user/traveler's mailing address.
State / Country, Lookup*	Button used to open Search State / Country Code window. The value selected will complete the State / Country field automatically.
Zip / Postal Code*	Field in which to enter 5-digit ZIP code for city.
Is mailing address same as residential address?	Field in which to identify if the mailing address is the same as the residential address. Residential address is populated with mailing address when marked Yes.
Routing List Name*	Field that identifies the user/traveler's routing list. This is a required field.
Default LOA Label	Drop-down list of available lines of accounting (LOAs) for the organization. The selected LOA will appear in all travel documents.

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

The screenshot shows a 'Personal Data' section with the following fields and values:

- Gender: * MALE (dropdown menu)
- Resident Address Line 1: 123 Oakwood Drive
- Resident Address Line 2: (empty text box)
- Resident City: King George
- Resident State / Country: VA (with a 'Lookup' button)
- Resident Zip / Postal Code: 22485
- Resident Phone Number: (empty text box)
- Emergency Contact Name: (empty text box)
- Emergency Contact Phone Number: (empty text box)

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

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

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION: PERSONAL DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Gender*	Drop-down list to select the user/traveler's gender. This is a required field.
Resident Address Line 1	Field in which to enter the user/traveler's residence address.
Resident Address Line 2	Field in which to enter the user/traveler's residence address, if necessary.
Resident City	Field in which to enter the user/traveler's city of residence.
Resident State / Country, Lookup	Button used to open Search State / Country Code window. The value selected will complete the State / Country field automatically.
Resident ZIP/ Postal Code	Field in which to enter the ZIP code or postal code of the user/traveler's residence.
Resident Phone Number*	Field in which to enter the telephone number of the user/traveler's residence.
Emergency Contact Name*	Field in which to enter the name of the user/traveler's organization emergency contact person.
Emergency Contact Phone Number*	Field in which to enter the telephone number for the user/traveler's organization emergency contact.

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

Duty Station Data

Printed Organization Name:

Present Duty Station Name:

Service / Agency by which the traveler is employed:

Number of Work Hours / Day:

Time Zone:

Duty Station Address Line 1:

Duty Station Address Line 2:

Duty Station City:

Duty Station State / Country:

Duty Station Zip / Postal Code:

Mail Code:

Duty Station Phone Number:

Duty Station Fax Number:

Number of Miles to Closest Airport:

Unit ID:

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*

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - DUTY STATION DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Printed Organization Name	Field to enter the name of the organization as it appears in print, e.g., SUPPORT SQUADRON.
Present Duty Station Name	Field to enter the name of the user/traveler's duty station.
Duty Station Fax Number	Field to enter the fax number at the user/traveler's duty station.
Service / Agency by which traveler is employed*	Drop-down list of all DoD service branches and agencies. This is a required field.
Number of Work Hours / Day	Field to enter number of hours in the user/traveler's typical workday. Must not exceed 24.
Time Zone*	Drop-down list from which to select the user/traveler's time zone. This is a required field.
Duty Station Address*	Fields to enter duty station address. This is a required field.
Duty Station City*	Field to enter duty station city. This is a required field.
Duty Station State / Country*, Lookup	Button used to open Search State / Country Code window. The value selected will complete the Duty Station State / Country field automatically. This is a required field.
Duty Station Zip / Postal Code*	Field to enter duty station ZIP code or postal code. The Master ZIP Code Directory verifies the accuracy of the associated fields in the user/traveler's profile. This is a required field.
Mail Code	Text field to enter the code that identifies the location at which the user/traveler receives mail.
Duty Station Phone Number*	Field to enter the user/traveler's phone number at their duty station. This is a required field.
Number of Miles to Closest Airport	Field to enter distance to the nearest airport.
Unit ID	Field to enter the Unit ID code.

Use the Lookup button to ensure that the correct state abbreviation or country code is entered in the field. Use the below steps to look up a state or country code:

- a) Select **Lookup** to the right of the State / Country field.

The Search State / Country Code window opens (Figure 7-15).

Figure 7-15: Search State/Country Code Window

- b) Enter the state postal abbreviation or country code in the text field.
c) Select **Search**.

The Search State / Country Code Results window opens (Figure 7-16).

Select Code	Code	Definition
Select	MD	MARYLAND
Select	MD	Moldavia

Figure 7-16: Search State / Country Code Results Window

- d) Select the correct state or country for the profile.

The profile screen refreshes with the State / Country field complete.

A domain error message will display if the ZIP code is not valid for the state or country (Figure 7-17).

Figure 7-17: Domain Error Message

10. Modify the **Other Data Elements** section fields (Figure 7-18).

Figure 7-18: Update Person (User/Traveler) Screen - Other Data Elements Section

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

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - OTHER DATA ELEMENTS SECTION	
FIELD OR OBJECT	DESCRIPTION
Tech Status*	Drop-down list, purpose is to be defined by the service or agency. This is a required field (Air Force Only).
Air Crew Status*	Drop-down list, purpose is to be defined by the service or agency. This is a required field (Air Force Only).

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 7-19).

Note: The Government Travel Charge Card (GTCC) is referred to as the Government Charge Card (GOVCC) in DTS.

Figure 7-19: Update Person (User/Traveler) Screen - Government Charge Card (GOVCC) Data Section

Table 7-9: Update Person (User/Traveler) Screen Description:
Government Charge Card (GOVCC) Data Section

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - GOVERNMENT CHARGE CARD (GOVCC) DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Gov't Charge Card Holder*	Radio buttons used to identify whether or not the user/travel has a GOVCC. This is a required field.
Advance Authorization	Drop-down list used to specify the advance type that a traveler can be authorized. DTAs cannot update this field in their own profile.
Mandatory Use of GOVCC*	Radio buttons used to specify payment for air transportation. Exempt radio button defaults air transportation to CBA. Non-exempt defaults air transportation to GOVCC. DTAs cannot update this field in their own profile.
Routing Number	Field for GOVCC routing number.
Account Number	Field for GOVCC account number.
GOVCC Exp Date	Drop-down list to select GOVCC expiration date.

12. Complete or update the following user/traveler information: **Checking Routing Number** and **Checking Account Number**
-OR-
Saving Routing Number and **Saving Account Number**
(Figure 7-20).

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 electronic financial transfer (EFT). If **No**, then the traveler must justify on each trip authorization why payments by EFT cannot be accepted.

Electronic Funds Transfer Data
Enter only one account with a routing number

Mandatory EFT Payment: * Yes No [More information](#)

Checking Routing Number:

Checking Account Number:

OR

Saving Routing Number:

Saving Account Number:

Figure 7-20: Update Person (User/Traveler) Screen - Electronic Funds Transfer Data Section

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

UPDATE PERSON (USER/TRAVELER) SCREEN DESCRIPTION - ELECTRONIC FUNDS TRANSFER DATA SECTION	
FIELD OR OBJECT	DESCRIPTION
Mandatory EFT Payment	Radio button used to show if EFT information is supplied. The system defaults to Yes.
Checking Routing Number	Field for personal checking account routing number.
Checking Account Number	Field for personal checking account number.
Saving Routing Number	Field for personal savings account routing number.
Saving Account Number	Field for personal savings account number.

13. Select **Save Changes**.

7.3.3 Detach a Person from an Organization

In order for an organization to receive a person, the DTA from the losing organization must detach the person. The DTA from the gaining organization must then receive the person. When a person is detached, they are assigned to the *None* organization. The None organization is a repository of people who are waiting to be received. The person will be unable to log in to DTS until the gaining organization receives the person. All organization-specific fields such as DTA ID, routing list, and default LOA in the personal profile will clear. The traveler maintains the GGMR(s) previously assigned in the detaching organization until received by the new organization. Once received into the new organization, the traveler will be removed from the old GGMR(s) and the new organization's GGMR(s) will trigger. When the user is received, some of these fields update automatically with the defaults of the receiving organization. The permission level will be reset to 0 and the user will have no Organization or Group Access.

To detach a user or user/traveler from an organization in DTS, the DTA must first search for the person by following the steps in Section 7.3.1. When the People (Search Results) screen opens (Figure 7-21), locate the name of the person who needs to be detached.

People (Search Results)					
Organization Name: DTMOCS		SSN:		Permission Level:	
Include Sub-Organizations: No		Last Name: graydon		Person Type: All	
Organization Access:		First Name:			
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>		Name: GRAYDON, JAMES P	SSN: XXXXX1212	Organization: DTMOCS	
			Permission: 0, 1, 2	Organization Access: DTMOCS	
			Rank: GM-14	Group Access: DTMOCS CSD	
1 - 1 of 1					

Figure 7-21: People (Search Results) Screen

Use the below steps to detach a person from an organization:

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

The Detach Person screen opens (Figure 7-22). This screen gives the DTA the opportunity to confirm that the correct person was selected to detach from the organization. If the wrong person was selected, choose **Cancel** and start over.

Detach Person	
Name:	GRAYDON, JAMES P
SSN:	XXXXX1212
Rank:	GM-14
Permission Level:	0, 1, 2
Organization Name:	DTMOCS
Organization Access:	DTMOCS
Group Access:	DTMOCS CSD
<input type="button" value="Detach Person"/> <input type="button" value="Cancel"/>	

Figure 7-22: Detach Person Screen

2. Select **Detach Person**.

The People (Search Results) screen refreshes. The detached person's name no longer appears on the list. This person is now 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 the DTA selects **Delete Person** on the Delete Person screen (Figure 7-24), one of two things happen, depending on whether or not the traveler still has signed documents in DTS. See Table 7-11.

Table 7-11: Results of a Delete Person Action

RESULTS OF A DELETE PERSON ACTION		
IF THE PERSON	THEN DTS	IS THIS REVERSABLE?
Has NO signed documents in DTS	Deletes their profile immediately.	No. A new profile must be created if the person needs to be entered back into DTS.
Has signed documents in DTS	Schedules their profile to be deleted in 15 months.	Yes, but only within the 15-month period. Use the Receive Person procedure. See DTS Document Processing Manual, Section 7.5.
	Schedules the dependents named in the profile to be deleted in 15 months.	
	Will not allow the person to log in.	
	Will keep their existing documents available for 15 months to authorized DTS users.	

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 7-23), locate the name of the person whose profile should be deleted.

People (Search Results)					
Organization Name: DTMOCSD		SSN:		Permission Level:	
Include Sub-Organizations: No		Last Name:		Person Type: All	
Organization Access:		First Name:			
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name:	CARSON, CHRIS A	SSN: XXXXX2346	Organization:	DTMOCSD
			Permission: 0, 1, 2	Organization Access:	DTMOCSD
			Rank: MO-04	Group Access:	(All)
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name:	CARSON, ERIC T	SSN: XXXXX2363	Organization:	DTMOCSD
			Permission: 0	Organization Access:	DTMOCSD
			Rank: GS-10	Group Access:	(All)
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name:	Carson, Eric T	SSN: XXXXX2371	Organization:	DTMOCSD
			Permission: 0	Organization Access:	No Org Access
			Rank: MW-04	Group Access:	(All)
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name:	CARSON, HELEN D	SSN: XXXXX2378	Organization:	DTMOCSD
			Permission: 0, 1, 2, 3, 4, 5, 6	Organization Access:	DTMOCSD
			Rank:	Group Access:	(All)
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name:	Dean, Helen D	SSN: XXXXX2390	Organization:	DTMOCSD
			Permission: 0, 1, 2, 3, 4, 5, 6	Organization Access:	No Org Access
			Rank:	Group Access:	None
<input type="button" value="Update"/> <input type="button" value="Detach"/> <input type="button" value="Delete"/> <input type="button" value="View Group(s)"/> <input type="button" value="View Dependents"/>	Name:	GRAYDON, JAMES P	SSN: XXXXX1212	Organization:	DTMOCSD
			Permission: 0, 1, 2	Organization Access:	DTMOCSD
			Rank: GM-14	Group Access:	DTMOCSD CSD
1 - 6 of 6					

Figure 7-23: People (Search Results) Screen

Follow the below steps 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 7-24).



The screenshot shows a window titled "Delete Person". At the top, there is a warning message: "Please note that this users dependants will also be deleted." Below this, the user's details are listed in a table-like format:

Name:	GRAYDON, JAMES P
SSN:	XXXX1212
Rank:	GM-14
Permission Level:	0, 1, 2
Organization Name:	DTMOCSD
Organization Access:	DTMOCSD
Group Access:	DTMOCSD CSD

At the bottom of the window, there are two buttons: "Delete Person" and "Cancel".

Figure 7-24: Delete Person Screen

The **Delete Person** screen allows the DTA the opportunity to confirm that the correct person selected for deletion from the organization. If the wrong person was chosen, select **Cancel** and choose.

2. Select **Delete Person**.

The Search Results screen (Figure 7-23) refreshes. The deleted person's name no longer displays on the list.

7.3.5 View Groups

The View Groups button allows the user to see all of the groups of which the traveler is a member. This button displays current group membership only. If a traveler has been detached from an organization, but not yet received into the new organization, the groups displayed for the traveler will be those of the detaching organization.

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

The Traveler's Group(s) Include screen opens (Figure 7-25).

Traveler's Group(s) Include	
Name: GRAYDON, JAMES P	SSN: XXXXX1212
Organization Name	Group Name
D	D GP
DTMO	DTMO GP
DTMOCSD	CSD
<input type="button" value="Close Window"/>	

Figure 7-25: Traveler's Group(s) Include Screen

The Traveler's Group(s) Include screen displays the groups to which the traveler has been added via automatic (GGMR) and manual methods.

7.3.6 View, Add, Update, and Delete Dependent Information

With proper approval, DTS users and user/travelers can create travel documents for traveler's dependents. DTAs can enter dependent information through the People function of the DTA Maintenance Tool so that the dependents are available for selection when a user or user/traveler is creating a travel document. They 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, the DTA must first search for the traveler by following the steps in Section 7.3.1. When the People (Search Results) screen opens (Figure 7-23), locate the name of the person for whom dependent information needs to be added or updated.

1. Select **View Dependents** next to the name of the person whose profile needs to be updated with dependent information.

The Dependents for Traveler screen opens (Figure 7-26). If the traveler has any dependent information in their profile, it will display on this screen.

Dependents for GRAYDON, JAMES P			
<input type="button" value="Add Family Member"/>			
<input type="button" value="Update"/> <input type="button" value="Delete"/>	Name:	GRAYDON, LUCY L	Date Of Birth (mm/dd/yyyy): 12/13/1947
		Passport Number:	1212121212121 Expiration Date: 08/30/2012

Figure 7-26: Dependents for Traveler Screen

7.3.6.1 Add Dependent Information

Beginning on the Dependents for Traveler screen (Figure 7-26), use the below steps to add information for a family member to the traveler's profile:

1. Select **Add Family Member**.

The Add Family Member screen opens (Figure 7-27).

The screenshot shows a web form titled "Add Family Member" with a "* Required" indicator in the top right. The form fields are as follows:

- First Name: * [Text Input]
- Middle Initial: [Text Input]
- Last Name: * [Text Input]
- Date Of Birth(mm/dd/yyyy): * [Text Input] with a calendar icon
- Relation: * [Dropdown Menu] showing "Spouse"
- Passport Number: [Text Input] showing "Not Provided"
- Expiration Date: [Text Input] showing "Not Provided" with a calendar icon

At the bottom of the form are two buttons: "Save Person" and "Cancel".

Figure 7-27: Add Family Member Screen

2. Complete the **First Name** field with the dependent's first name.
3. (Optional) Complete the **Middle Initial** field with the dependent's middle initial.
4. Complete the **Last Name** field with the dependent's last name.
5. Complete the **Date of Birth** field with the dependent's birth date. The year must consist of four digits. Select the **calendar** icon to choose a date from the calendar and edit the year if necessary.
6. Select the **Relation** drop-down list arrow and choose the relationship of this dependent to the DTS traveler.
7. Complete the **Passport Number** field with the dependent's passport number.
8. Complete the **Expiration Date** field with the date on which the dependent's passport will expire. A future date is required for this field. Select the **calendar** icon to choose a date from the calendar and edit the year if necessary. The year must consist of four digits.
9. Select **Save Person**.
-OR-
Select **Cancel** to return to the Dependents for Traveler screen without adding the dependent (Figure 7-26).

The Dependents for Traveler screen refreshes (Figure 7-28). It now displays information pertaining to the added dependent.

Dependents for GRAYDON, JAMES P				
Add Family Member				
<input type="button" value="Update"/> <input type="button" value="Delete"/>	Name:	GRAYDON, CATHERINE C	Date Of Birth (mm/dd/yyyy):	12/31/1993
			Passport Number:	Not Provided
<input type="button" value="Update"/> <input type="button" value="Delete"/>	Name:	GRAYDON, LUCY L	Date Of Birth (mm/dd/yyyy):	12/13/1947
			Passport Number:	1212121212121

Figure 7-28: Dependents for Traveler Screen (Family Member Added)

7.3.6.2 Update Dependent Information

Beginning on the Dependents for Traveler screen (Figure 7-26 and Figure 7-28), use the below steps 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 7-29). It displays the current information for the selected dependent.

Edit Family Member		* Data Required
First Name:	* CATHERINE	
Middle Initial:	C	
Last Name:	* GRAYDON	
Date Of Birth(mm/dd/yyyy):	* 12/31/1993	
Relation:	* Child	
Passport Number:	Not Provided	
Expiration Date:	Not Provided	
<input type="button" value="Save Changes"/> <input type="button" value="Cancel"/>		

Figure 7-29: 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**.
-OR-
Select **Cancel** to return to the Dependents for Traveler screen without changing any of the information (Figure 7-28).

7.3.6.3 Delete Dependent Information

Beginning on the Dependents for Traveler screen (Figure 7-26 and Figure 7-28), use the below steps to delete a dependent's information from the traveler's profile:

1. Select **Delete**.

The Delete Family Member screen opens (Figure 7-30). It displays the current information for the selected dependent.

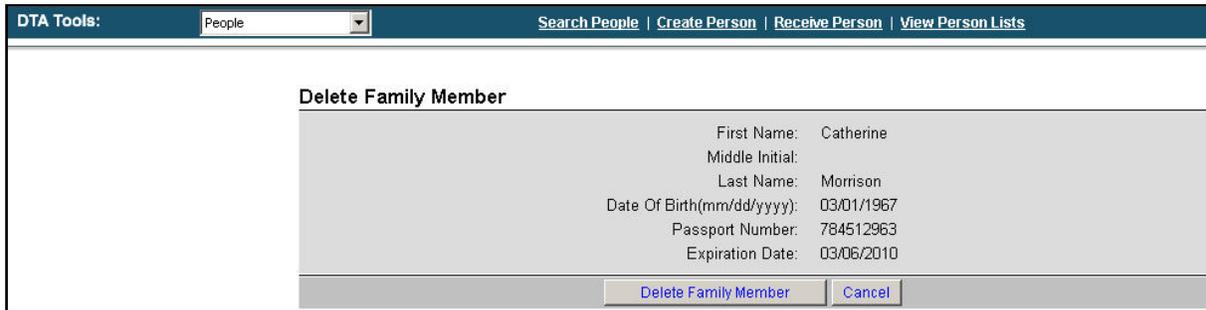


Figure 7-30: Delete Family Member Screen

2. Select **Delete Family Member**.
-OR-
Select **Cancel** to return to the Dependents for Traveler screen without deleting this dependent from the traveler's profile (Figure 7-28).

The Dependents for Traveler screen opens (Figure 7-31). It no longer displays the deleted dependent's information.



Figure 7-31: Dependents for Traveler Screen – Dependent Deleted

7.4 Create a Personal Profile

DTAs can create a personal profile for only new users to whom they have access, based on the hierarchical setup in DTS. See Section 7.3.2.3, Update Person (User/Traveler), for descriptions of each of the fields in the user/traveler personal profile.

Use the below steps 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 7-32). Four links display on the navigation bar: Search People, Create Person, Receive Person, and View Person Lists.

Figure 7-32: Search People Screen

2. Select **Create Person**.

The Create Person screen opens (Figure 7-33).

Figure 7-33: Create Person Screen

3. Complete the **SSN** field with the new person's SSN.
4. Select the **Yes** or **No** radio button to indicate whether or not the user 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 below steps to create a personal profile for a user/traveler. Steps 16 through 45 do not apply when creating a profile for a person who is a user only.

5. 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 7-34).

Create Person (User Only) * Required

Common Data

SSN: XXXXX1212

First Name: * JAMES

Middle Initial: P

Last Name: * GRAYDON

Organization Name: * DTMOCS

Email: james.p.graydon@email.mil

Figure 7-34: Create Person Screen - Common Data Section

Note: See Table 7-2 for a description of the Common Data section.

6. Complete the **First Name** and **Last Name** fields. The Middle Initial field is optional.
7. Select the **Organization Name** drop-down list arrow and choose the new person’s organization.
8. Complete the **Email** field with the new person’s e-mail address.

Note: See Table 7-2 for a description of the User-Specific Data section (Figure 7-35).

User Specific Data

Organization Access: * DTMOCS

Group Access: DTMOCS --Organization Owner Name
CSD --Group Name

Editable Permission Level(s): * 0 1 2 3 4 5 6 7 8 9

Approval Override: * Yes No

Manually Entered Transaction: * Yes No

Non-DTS Entry Agent (T-Entered): * Yes No

Self-AO Approval: * Yes No

User ID: DEFAULT

Figure 7-35: Create Person Screen - User-Specific Data Section

9. Select the **Organization Access** drop-down list arrow and choose the correct value.
10. Select the **Organization Owner Name** drop-down list arrow. Select the organization from the list, if the new person will have group access.
11. Select the **Group Name** drop-down list arrow. Select the appropriate group name from the list.

12. Check the **Editable Permission Levels** check boxes to grant the appropriate permissions to the new person.
13. Select the **Yes** or **No** radio button for Approval Override. This indicates whether or not the person will be able to override limited reimbursement on documents in DTS. Approval Override requires permission level 7.
14. Select the **Yes** or **No** radio button for Manually Entered Transaction. This indicates whether or not the person will be able to use the **Manual Transaction** feature in the Budget Administration Tool.
15. Select the **Yes** or **No** radio button to indicate whether the person's role will be that of an NDEA.
16. Select the **Yes** or **No** radio button for **Self AO Approval**. This indicates whether or not the person can approve their own travel documents (authorizations only).

Note: See Table 7-5 for a description of the General Travel Data section (Figure 7-36).

The screenshot shows the 'General Traveler Data' section of a web form. The fields are as follows:

- Civilian / Military: * C - Civilian (dropdown)
- Title / Rank: * GM-14 (dropdown)
- Mailing Address Line 1: * 123 Oakwood Drive (text input)
- Mailing Address Line 2: (empty text input)
- City: * King George (text input)
- State / Country: * VA (text input) with a 'Lookup' button
- Zip / Postal Code: * 22485 (text input)
- Is mailing address same as residential address?: Yes No
- Routing List Name: * CSD (dropdown)
- Default LOA Label: 09 CONFERENCE (dropdown)

Figure 7-36: Create Person (User/Traveler) Screen - General Traveler Data Section

17. Select the **Civilian / Military** drop-down list arrow and choose the correct **value** from the list.
18. Select the **Title / Rank** drop-down list to choose the correct **value**.
19. Complete the **Mailing Address**, **City**, **State / Country**, and **Postal Code** fields. Use the **Lookup** button to search for the state or country. Indicate if the mailing address is the same as the residence.
20. Select the **Routing List Name** drop-down list to choose the correct **value**.
21. Select the **Default LOA Label** drop-down list arrow to choose the correct **value**.

Note: See Table 7-6 for a description of the Personal Data section (Figure 7-37).

The screenshot shows a form titled "Personal Data" with the following fields and values:

Field	Value
Gender *	MALE
Resident Address Line 1:	123 Oakwood Drive
Resident Address Line 2:	
Resident City:	King George
Resident State / Country:	VA
Resident Zip / Postal Code:	22485
Resident Phone Number:	540-775-1122
Emergency Contact Name:	CECILE MARSTON
Emergency Contact Phone Number:	202-258-1234

Figure 7-37: Create Person (User/Traveler) Screen: Personal Data Section

22. Select the **Gender** drop-down list to choose the correct **value**.
23. Complete the **Resident City** field with the person's city of residence.
24. Complete the **State / Country** field. Use the **Lookup** button to search for the state or country.
25. Complete the **Resident Phone Number** field with the telephone number of the person's residence.
26. Complete the **Emergency Contact Name** field and the **Emergency Contact Phone Number** field with the name and phone number of the person's organization emergency contact.

Note: See Table 7-7 for a description of the Duty Station Data section (Figure 7-38).

Duty Station Data

Printed Organization Name:

Present Duty Station Name:

Service / Agency by which the traveler is employed: * ▼

Number of Work Hours / Day:

Time Zone: * ▼

Duty Station Address Line 1: *

Duty Station Address Line 2:

Duty Station City: *

Duty Station State / Country: *

Duty Station Zip / Postal Code: *

Mail Code:

Duty Station Phone Number: *

Duty Station Fax Number:

Number of Miles to Closest Airport:

Unit ID: *

Figure 7-38: Create Person (User/Traveler) Screen: Duty Station Data Section

27. Complete the **Printed Organization Name** field with the name of the person's organization.
28. Complete the **Present Duty Station Name** field with the name of person's duty station.
29. Select the **Service / Agency by which the traveler is employed** drop-down list arrow. Choose the correct **value**.
30. Complete the **Number of Work Hours / Day** field with the number of hours in the person's typical workday.
31. Select the **Time Zone** drop-down list arrow. Choose the correct **value**.
32. Complete the **Duty Station Address** fields with person's duty station address and contact information.
33. Complete the **Number of Miles to Closest Airport** field by entering the number of miles to the nearest airport.
34. 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 7-39).



Other Data Elements

Tech Status (For Information Only): * No

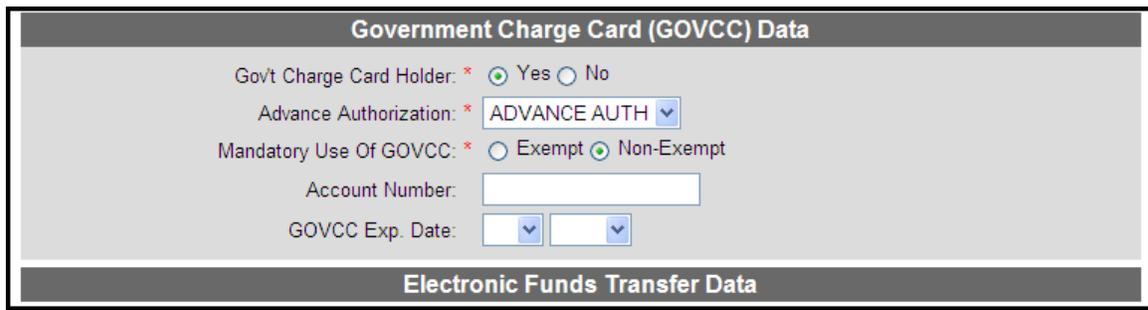
Figure 7-39: Create Person (User/Traveler) Screen - Other Data Elements Section

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

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

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

Note: See Table 7-9 for a description of the Government Charge Card (GOVCC) Data section (Figure 7-40).



Government Charge Card (GOVCC) Data

Gov't Charge Card Holder: * Yes No

Advance Authorization: * ADVANCE AUTH

Mandatory Use Of GOVCC: * Exempt Non-Exempt

Account Number: [Text Field]

GOVCC Exp. Date: [Month] [Year]

Electronic Funds Transfer Data

Figure 7-40: Create Person (User/Traveler) Screen - Government Charge Card (GOVCC) Data Section

37. Select either the **Yes** or **No Gov't Charge Card Holder** radio button.

38. Select the **Advance Authorization** drop-down list arrow. Choose the correct **value**.

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

40. Complete the **Account Number** field with the GOVCC number.

41. 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 7-41).

Figure 7-41: Create Person (User/Traveler) Screen: Electronic Funds Transfer Data Section

42. Complete or update the following user/traveler information: **Checking Routing Number** and **Checking Account Number**
-OR-
Saving Routing Number and **Saving Account Number** (Figure 7-41).

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.

43. Select **Save Changes**.

7.5 Receive a Person

When a traveler's organization assignment is changed to an organization outside of the DTA's Organization Access, the traveler must be detached from the old organization. Once detached, the traveler can be received into the new organization. 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.

In order to receive people into an organization, the DTA must search for the person's personal profile in DTS. Use the below steps 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 7-42). Four links display in the navigation bar: Search People, Create Person, Receive Person, and View Person Lists.

The screenshot shows a web interface for searching people. At the top, there is a navigation bar with 'DTA Tools: People' and four links: 'Search People', 'Create Person', 'Receive Person', and 'View Person Lists'. Below this is a form titled 'Search People' with a '* Required' indicator. The form contains several fields: 'Organization Name' with a dropdown menu showing 'DFCWTA509BW' and a search icon; 'Person Type' with a dropdown menu showing 'All'; 'SSN' with a text input field; 'Last Name' with a text input field; 'First Name' with a text input field; 'Organization Access' with a dropdown menu; and 'Permission Level' with a dropdown menu. A 'Search' button is located at the bottom right of the form.

Figure 7-42: Search People Screen

2. Select **Receive Person**.

The **Search Person to Receive** screen opens (Figure 7-43).

The screenshot shows a web interface for searching a person to receive. The form is titled 'Search Person to Receive' with a '* Required' indicator. It contains two main fields: 'SSN' with a text input field and a red asterisk, and 'Receiving Organization Name' with a dropdown menu showing 'DFCWT509BWMSG' and a search icon. A 'Search' button is located at the bottom center of the form.

Figure 7-43: Search Person to Receive Screen

3. Complete the **SSN** field with the SSN of the person to be received.
4. Select the **Receiving Organization** drop-down list arrow. Choose the organization that will receive the person.
5. Select **Search**.

The **Receive Person** screen opens (Figure 7-44). This screen displays the record of the person whose SSN matched the SSN entered in the **Search Person to Receive** screen. When a person is received into an organization, the organization's default routing list and DTA ID are entered into the profile automatically. The person will be added as a member of the groups specified by the organization's GGMRs. Permissions will reset to 0 and all access will revert to none. If the person was scheduled for deletion, the 15-month schedule will be cancelled. When received by the new organization, the person will be able to log in to DTS and must validate their personal profile.

6. Select **Receive Person** to assign the person to the receiving organization (Figure 7-44).

Receive Person	
SSN:	857531144
Name:	CAIN, DANA
Title / Rank:	GS-13
Organization Name:	DFCWT509BWMSG
Service / Agency:	Defense Finance & Accounting Service
Routing List Name:	MSGRL
DTA ID:	1192
<input type="button" value="Receive Person"/> <input type="button" value="Cancel"/>	

Figure 7-44: Receive Person Screen

7. The People (Search Results) screen opens (Figure 7-45).

People (Search Results)					
Organization Name:		SSN: 857531144		Permission Level:	
Include Sub-Organizations:	No	Last Name:		Person Type:	All
Organization Access:		First Name:			
<input type="button" value="Update"/>	Name: CAIN, DANA	SSN: 857531144	Organization:	DFCWT	
<input type="button" value="Detach"/>		Permission: 0	Organization Access:	No Org Access	
<input type="button" value="Delete"/>		Rank: GS-13	Group Access:	None	
<input type="button" value="View Group(s)"/>					
<input type="button" value="View Dependents"/>					

Figure 7-45: 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 indicating that the person has not been detached.

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 the creation of lists of the following types of personal information:

- *Basic Traveler Information List.* Displays several items from a traveler's profile, including organization, UIN, access, and default LOA.
- *Complete Traveler Information List.* Displays all items from a traveler's profile, including Privacy Act Information and full SSN (if indicated).
- *Accounts Information List.* Displays information regarding a traveler's GOVCC and checking account(s) (if applicable).
- *Special Features Information List.* Displays information indicating which user/travelers 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.

Use the below steps to view a Person List:

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

The Search People screen opens (Figure 7-42).

2. Select **View Person Lists**.

The View Person Lists screen opens (Figure 7-46).

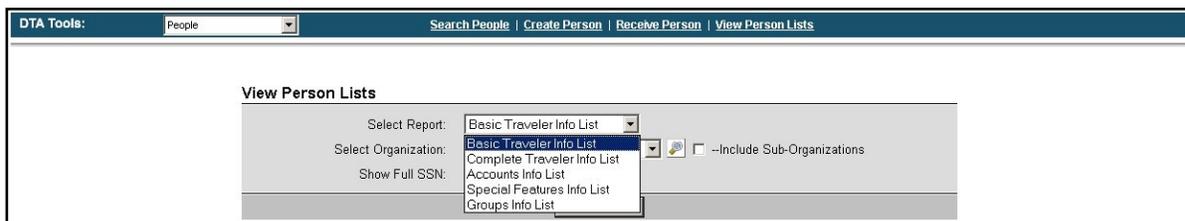


Figure 7-46: View Person Lists Screen

3. Choose the **Select Report** drop-down list and select the **list type**.
4. Choose the **Select Organization** drop-down list and select the **organization** to be included in the report.
5. Select **Show Full SSN** to see a traveler's complete SSN.

Note: DTAs will only be able to select Show Full SSN if they select **Complete Traveler Information List**.

6. Select **Run Report**.

DTAs are prompted to download the compiled report, which they may download to their computer or view in a separate window as a .csv file (Excel spreadsheet).

The selected Person List displays. Figure 7-47 shows the Special Features list.

A	B	C	D	E	F	G	H	I	J	K	L
1	For Official Use Only										
2	Contains Personally Identifiable Information covered by the Privacy Act of 1974										
3	Organization Name	Last Name	First Name	Middle Initial	SSN (Last 4 digits)	Permission Levels	NDEA Status	Self-AuthORIZING Status	Signature Override Status	Debt Management	Traveler Email Address
4	Title: Special Features Info List Run Date: Wed May 10 16:44:53 EDT 2006 Search Criteria: Organization: DFCWT Sub-Orgs: No										
5	DFCWT	TestB	CBA		XXXX9997	7	No	No	No	No	sdfg@as.com
6	DFCWT	TestC	CBA		XXXX9998	9	No	No	No	No	
7	DFCWT	TestA	CBA		XXXX9996	479	No	No	No	No	manleen.kaur@ngc.c
8	DFCWT	sf	dsfgsd		XXXX4242323	1	No	No	No	No	wre@fgh.com
9	DFCWT	lkjlkj	lkjlk		XXXX5888888	25	No	No	No	No	
0	DFCWT	Seinfeld	Jerry		XXXX1166	123456789	No	No	No	No	
1	DFCWT	Kramer	Cosmos		XXXX1167	123456	No	No	No	No	
2	DFCWT	Posanski	Scott	>	XXXX1037	123456789	Yes	Yes	Yes	No	scott@example.net
3	DFCWT	DBsign	UserThree		XXXX0024	0	No	No	No	No	
4	DFCWT	Thomas	Kimberly		XXXX1031	123456789	No	No	No	No	kimberly.thomas@ng
5	DFCWT	Noble	Bruce	D	XXXX1032	123456789	No	Yes	No	No	
6	DFCWT	Damon	Sam	T	XXXX5593	123456789	Yes	No	No	No	sdamon@yahoo.com
7	DFCWT	Roberts	Brett	A	XXXX1034	123456789	No	No	No	No	brett.a.roberts@gmai
8	DFCWT	Schisel	Denise	M	XXXX1035	0	No	No	No	No	denise_schisel@yah
9	DFCWT	Thomas	Bret		XXXX10312	12	No	No	No	No	abc@example.com

Figure 7-47: Person List - Special Features List Example

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