



MANUAL



DTA Manual, Chapter 7: People

March 13, 2025

V1.7



Table of Contents

Revision History	2
Chapter 1: Introduction to DTS Personal Profiles	3
1.1 DTS Profile Types.....	3
1.2 DTS Personal Profile	3
1.2.1 Profile Common Data	3
1.2.2 Profile User Specific Data	4
1.2.3 Profile General Traveler Data	6
1.2.4 Profile Personal Data.....	7
1.2.5 Profile Duty Station Data.....	8
1.2.6 Profile Other Data Elements	9
1.2.7 Profile Government Charge Card (GOVCC) Data	10
1.2.8 Profile Electronic Funds Transfer Data	11
1.3 Establishing Profile Information.....	11
1.3.1 Individual Self Registers and Updates Personal Profile	12
Chapter 2: Working with DTS Profiles	13
2.1 Search for a Profile	14
2.2 Update a Profile	15
2.3 Detach a Profile	16
2.4 Delete a Profile	17
2.5 View Traveler’s Groups	18
2.6 Dependent Information	18
2.6.1 Add Dependent Information	19
2.6.2 Update Dependent Information	19
2.6.3 Delete Dependent Information	20
2.7 Create a Personal Profile.....	20
2.7.1 Designate a Traveler Profile as a Self-AO	21
2.7.2 Identify a Traveler Profile as Self-AO in a Routing List.....	22
2.8 Receive a Profile	22
Chapter 3: Person Module Reports	24
3.1 View Person List.....	24
Chapter 4: The DTA Manual: Contents & Links	26

Revision History

Revision No.	Date	Authorization	Revision/Change Description	Page, Section
1.0	04/25/18	Defense Travel Management Office (DTMO)	Changed format, updated language & screenshots	All
1.1	07/09/18	DTMO	Updated URLs to “https” vs. “http”	Throughout
1.2	08/18/20	DTMO	General review and update Updated the delete profile section Updated the receive profile section	All Section 3 Section 3
1.3	11/13/20	DTMO	General review Updated Table of Contents format	All Page 2
1.4	01/22/22	DTMO	Updated Delete Profile process	Section 2.4
1.5	08/16/22	DTMO	General review Updated screen shots and wording Added Delegated Authority Removal Updated to Rebranded effort	All Throughout Section 2.3 Throughout
1.6	10/13/23	DTMO	General review Updated footers Updated wording for permission level 0 Updated Personal Profile screen Updated Create and Detach profile Updated Delete process Removed Table 7-9	All Throughout Page 3 Page 4 Pages 15-16 Page 18 Page 18
1.7	03/13/25	DTMO	General review Updated Gender to Sex	All Page 8

Chapter 1: Introduction to DTS Personal Profiles

For the Defense Travel System (DTS), anyone who requires access must have a profile. DTS uses information in that profile to determine what DTS tools a person may access and what actions they may take in the system. As a Defense Travel Administrator (DTA), one of your responsibilities may be the creation and maintenance of the personal profiles that belong to personnel assigned to your organizations. **Note:** For the purposes of this document, the terms “person,” “profile,” “DTS profile,” “personal profile,” and similar terms are generally synonymous.

This chapter explains how you the DTA manage the personal profiles in DTS.*

1.1 DTS Profile Types

DTS supports two types of profiles: *User* profiles and *User/Traveler* profiles. A person has a profile type based solely on whether or not they will perform official travel for DoD. A person who never does (or never will) perform official travel has a DTS *User* profile. A person who does (or may) perform official travel has a *User/Traveler* profile. In this respect, their assigned DTS roles, if any, are irrelevant to their profile type.

1.2 DTS Personal Profile

A DTS *User* profile only contains enough information for DTS to confirm the individual’s identity and permit access to the DTS tools and modules required to perform their assigned DTS roles. A *User/Traveler* profile contains that same information, but also includes data necessary to support travel document processing and voucher payments (e.g., personal address, duty station address, financial information). By design, when creating a DTS *User* or *User/Traveler* profile and when receiving a detached profile into an organization, the system auto-grants **Permission Level 0** which is required to access DTS. Although other permissions and accesses may be necessary to complete their functions, at a minimum everyone will have **Permission Level 0**. Sections 1.2.1 through 1.2.8 provide more details about profile contents.

Key Note 1: In all profile sections, a red asterisk denotes a mandatory field.

Key Note 2: Slightly different fields display in the personal profile screens, depending on whether you are creating or updating the profile. Clarification of these differences are further below.

Key Note 3: At the time of organization assignment, the *User/Traveler* profile automatically receives the organization’s default routing list, unless a DTA changes it.

1.2.1 Profile Common Data

The **Common Data** section (Figure 7-1), which appears in both *User* and *User/Traveler* profiles, holds very basic personal information. Table 7-1 explains its contents in detail.

The image shows a form titled "Common Data" with the following fields and values:

- SSN: XXXXX2111
- First Name: * [Empty text box]
- Middle Initial: [Empty text box]
- Last Name: * [Empty text box]
- Organization Name: * DTMOCSD
- Email: * [Empty text box]

Figure 7-1: Personal Profile – Common Data Section

Table 7-1 explains its contents in detail.

Table 7-1

COMMON DATA FIELDS	
Field	Description
SSN	The person’s Social Security number. This is a non-editable field.
First Name Middle Initial Last Name	Enter the person’s name.
Organization Name	Enter/select the assigned organization for the person.
Email	Enter the person’s work email address.

1.2.2 Profile User Specific Data

The **User Specific Data** section (Figure 7-2) appears in both User and User/Traveler profiles. It contains information that allows DTS to provide access to various DTS tools and modules. **Note:** Permission Level 0 appears as a **Non-Editable Permission Level**. You can’t remove **Permission Level 0**. This system auto-grant process ensures all users receive access to DTS.

DTA Tools: People | Search People | Create Person | Receive Person | View Person Lists

Create Person (User / Traveler) * Required

For "Organization Name", "Organization Access", and "Group Access" fields, please enter four or more characters in the corresponding field to display list of available organizations.

Common Data

SSN: XXXXX3398
 First Name: * Eric
 Middle Initial: T
 Last Name: * Baker
 Organization Name: * DTMOCS D
 Email: * email@email.com

User Specific Data

Organization Access: No Org Access

Group Access: --Organization Owner Name
 None --Group Name

Non-editable Permission Level(s): 0
 Editable Permission Level(s): * 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

It may take up to a day to propagate a user to specific groups in the BI and Reporting Tool, depending on permission levels.

DTA's BI Advanced Reporting Access: No
 BI Advanced Reporting Access: * NO
 Self-AO Approval: * Yes No
 User ID: DEFAULT [Reset User ID](#)

Figure 7-2: Personal Profile – User Specific Data Section

Table 7-2 explains its contents in detail.

Table 7-2

USER SPECIFIC DATA FIELDS	
Field	Description
Organization Access	Enter the person’s main organization. Allows the person to edit the DTS assets (e.g., routing lists, budgets) of the named organization and its subordinate organizations.
Group Access	<i>Organization Owner Name:</i> Enter the organization that owns the group. Allows you to select a Group Name.
	<i>Group Name:</i> Select the group. Allows the person to see travel documents of travelers who are members of the group.
Non-editable Permission Level(s)	Permission Level 0 is auto-granted as a non-editable during creation, update and receive profile actions. Other non-editable permissions display when editing a profile. Shows permission levels the person has, but that you can’t change (e.g., because you don’t have the permission level).

Editable Permission Level(s)	Checked boxes show the person’s permission levels. Check or uncheck boxes to grant or revoke permission levels.
Approval Override	Defaults to No . Non-editable unless you have permission level 7. Shows whether the person may approve travel documents without being on a routing list.
Manually Entered Transaction	Defaults to No . Select Yes if the person may enter an adjustment transaction into the budget. (Usually, Finance and Budget DTAs have this option.)
Non DTS Entry Agent (T-Entered)	Defaults to No . Select Yes if the person may sign vouchers on behalf of travelers.
Debt Management Monitor	(Only displays when editing a profile.) Defaults to No . Select Yes if the person may use DTS to track travel debt and collection actions.
DTA’s BI and Reporting Tool Access	Non-editable. Yes or No indicates whether or not you may access the Business Intelligence and Reporting Tool (BIRT).
BI Advanced Reporting Access	Non-editable if you don’t have access to BIRT. If editable, defaults to No . Select Yes if the person may access BIRT.
Self AO Approval	Defaults to No . Select Yes if the person may sign their own DTS authorizations.
User ID	Non-editable. Displays DEFAULT if the person’s DTS account is inactive. Updates to the person’s User ID when they log in to DTS for the first time.
Reset User ID	Select to inactivate the person’s DTS account. Useful in some troubleshooting scenarios (e.g., DTS won’t recognize the person’s Common Access Card).

1.2.3 Profile General Traveler Data

The **General Traveler Data** section (Figure 7-3) only appears in User/Traveler profiles. It contains the traveler’s contact information at work and some personal information DTS needs when creating travel documents.

General Traveler Data

Civilian / Military: *

Title / Rank: * You must select an option from the 'Civilian / Military' list.

Mailing Address Line 1: *

Mailing Address Line 2:

City: *

State / Country: *

Zip / Postal Code: *

Is mailing address same as residential address? Yes No

Routing List Name: *

Default LOA Label:

Figure 7-3: Personal Profile – General Traveler Data Section

Table 7-3 explains its contents in detail.

Table 7-3

GENERAL TRAVELER DATA FIELDS	
Field	Description
Civilian / Military	Identify the person as a DoD civilian, a military enlisted person, or a military officer.
Title / Rank	Select the person’s pay grade. Options populate after you select the Civilian / Military option. For military personnel, additional fields for the person’s Active / Reserve Category and Military Branch of Service display.
Mailing Address Line 1 Mailing Address Line 2 City State / Country [Lookup] Zip / Postal Code	Enter the person’s work address. If needed, use Lookup to find the state or country code.
Is mailing address same as residential address?	Defaults to No . Select Yes to copy all address fields into the Personal Data section.
Routing List Name	Select the routing list that will automatically populate in the person’s DTS travel documents.
Default LOA Label	Select the default line of accounting (LOA) that will automatically populate in the person’s DTS travel documents.

1.2.4 Profile Personal Data

The **Personal Data** section (Figure 7-4) only appears in User/Traveler profiles. It contains the traveler’s home contact information. Table 7-4 explains its contents in detail.

Personal Data

Gender: * MALE

Resident Address Line 1:

Resident Address Line 2:

Resident City:

Resident State / Country:

Resident Zip / Postal Code:

Resident Phone Number: *

Emergency Contact Name: *

Emergency Contact Phone Number: *

Figure 7-4: Personal Profile – Personal Data Section

Table 7-4 explains its contents in detail.

Table 7-4

PERSONAL DATA FIELDS	
Field	Description
Sex	Select the appropriate data. Either Male or Female radio button.
Residence Address	Enter the person’s residence address. If needed, use Lookup to find the state or country code. Note: If you selected Yes to the question, “Is mailing address same as residential address?” in the General Traveler Data section, DTS populates this information for you.
Resident Phone Number	Enter the person’s cell / home telephone number.
Emergency Contact Name	Enter the name of the person’s emergency contact.
Emergency Contact Phone Number	Enter the emergency contact’s cell/ home telephone number.

1.2.5 Profile Duty Station Data

The **Duty Station Data** section (Figure 7-5) only appears in User/Traveler profiles. It contains the traveler’s duty station information, and some additional information DTS needs when creating travel documents.

The screenshot shows a form titled "Duty Station Data" with the following fields:

- 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 7-5: Personal Profile – Duty Station Data Section

Table 7-5 explains its contents in detail.

Table 7-5

DUTY STATION DATA FIELDS	
Field	Description
Printed Organization Name	Enter the real (i.e., not DTS) name of the person’s organization.
Present Duty Station Name	Enter the name of the person’s duty station.
Service / Agency by which the traveler is employed	Select the person’s Component.
Number of Work Hours / Day	Select the number of hours the person spends at work each workday.
Time Zone	Select the time zone the duty station is in.
Duty Station Address Line 1 Duty Station Address Line 2 Duty Station City Duty Station State / Country [Lookup] Duty Station ZIP/ Postal Code	Enter the person’s duty station address. If needed, use Lookup to find the state or country code.
Mail Code	Enter the duty station mail code, if any.
Duty Station Phone Number	Enter the duty station’s emergency contact cell / home telephone number.
Duty Station Fax Number	Enter the duty station’s fax number.
Number of Miles to Closest Airport	Enter the distance from the duty station to the nearest airport.
Unit ID	Enter the unit ID code.

1.2.6 Profile Other Data Elements

The **Other Data Elements** section (Figure 7-6) only appears in User/Traveler profiles. It contains one or two pieces of additional information that DTS needs in rare travel situations.

Other Data Elements

Tech Status (For Information Only): * ▼

Air Crew Status (For Information Only): * ▼

Figure 7-6: Personal Profile – Other Data Elements Section

Table 7-6 explains its contents in detail.

Table 7-6

OTHER DATA FIELDS	
Field	Description
Tech Status (For Information Only)	Defaults to No . Select Yes if the person is a dual-status military technician.
Air Crew Status (For Information Only)	Only appears for military personnel. Defaults to No . Your Component determines the circumstances under which you would select Yes .

1.2.7 Profile Government Charge Card (GOVCC) Data

The **Government Charge Card (GOVCC) Data** section (Figure 7-7) only appears in User/Traveler profiles. It contains information about the traveler’s Government Travel Charge Card (GTCC) account.

Note: DTS uses the abbreviation *GOVCC* instead of *GTCC*.

Government Charge Card (GOVCC) Data

CSA/TTR: * No

Gov't Charge Card Holder: * Yes No

Advance Authorization: *

Mandatory Use Of GOVCC: * Exempt Non-Exempt

Account Number:

GOVCC Exp. Date:

Figure 7-7: Personal Profile – GOVCC Data Section

Table 7-7 explains its contents in detail.

Table 7-7

GOVERNMENT CHARGE CARD (GOVCC) DATA FIELDS	
Field	Description
CSA/TTR	This field is not editable and is no longer used.
Gov't Charge Card Holder	Defaults to Yes . Select No if the person is not a GTCC holder.
Advance Authorization	Defaults to CARD HOLDER , which prevents the person from requesting travel advances. Change to another option to allow the person to request a travel advance.
Mandatory Use of GOVCC	Defaults to Non-Exempt , which forces certain payments to GTCC and prevents travel if valid GTCC data is absent. Select Exempt to allow travel even without valid GTCC data.
Account Number	Enter the person’s GTCC account number.
GOVCC Expiration Date	Select the person’s GTCC expiration date (month and year).

1.2.8 Profile Electronic Funds Transfer Data

The **Electronic Funds Transfer Data** section (Figure 7-8) only appears in User/Traveler profiles. It contains information about the traveler’s personal checking and/or savings account. This information allows the traveler to receive electronic payments. DoD requires EFT data in most cases.

Figure 7-8: Personal Profile – Electronic Funds Transfer Data Section

Table 7-8 explains its contents in detail.

Table 7-8

ELECTRONIC FUNDS TRANSFER DATA FIELDS	
Field	Description
Mandatory EFT Payment	Defaults to Yes . Select No <u>only</u> if the person does not have an account with a financial institution that can receive EFTs. If you select No , the traveler must justify the selection on every trip authorization.
Checking Routing Number Checking Account Number OR Saving Routing Number Saving Account Number	Unless you set Mandatory EFT Payment to No (very rare), you must enter EFT information for a checking or savings account, but not both.

1.3 Establishing Profile Information

As a DTA, you can create and maintain personal profiles for your organization in the **DTA Maintenance Tool**, **People** module. Another option is individuals can create their own profiles using the **Self Registration Tool** (with certain exceptions) and then update their information as needed within DTS. **Note:** Contact your Component or Local POC to determine how your organization will establish profiles for DTS access.

In general:

- Smaller organizations and organizations experiencing little personnel turnover, may prefer a DTA to create and maintain personal profiles.
 - See Section 2.2 for instructions on updating DTS personal profiles.
 - See Section 2.7 for instructions on how to create personal profiles when a new arrival does not have a DTS personal profile.

Even if a DTA creates the personal profile, the traveler should review the data to ensure accuracy. After all, a DTA is not always able to know when another person's personal details (e.g., home phone number, bank account information) change.

- Larger organizations and organizations with a great deal of personnel turnover, may require individuals to create their own profiles as much as possible. See Section 1.3.1 for **Self Registration** process.

Once the profile is in DTS, the traveler can update most information. There are a few fields which a traveler can't edit (rank/grade or an organization of reassignment), so a DTA (not a traveler) must update the profile on behalf of the traveler.

Note: Recommend periodically reviewing profiles and updating the information before document creation to reduce document processing and payment problems.

1.3.1 Individual Self Registers and Updates Personal Profile

New arrivals who do not have a DTS personal profile can use the **Self Registration Tool** to create their own personal profile. They can complete most of the form on their own, but usually are unfamiliar with required data such as their DTS organization name. Whenever possible, a DTA should provide a reference sheet to assist with profile setup. The [DTS Guide 1: Overview](#) provides the steps on how an individual completes the form.

When they finish entering their self registration information, they submit the **Self Registration** request. A DTA at your site reviews and accepts the **Self Registration** profile and DTS auto-grants **Permission Level 0**, then the individual can log in to DTS. For the DTA actions, see the [DTA Manual, Appendix A: Self Registration](#).

Regardless of who initially created the DTS profile, all personnel should verify and when necessary update their own information.

Here's how a traveler updates their profile:

- From the DTS **Dashboard**, access the **Login Information**. They select their name and a drop-down provides access to **My Profile**. From here, they can change their information at any time.
- The first time they try to create a travel document, DTS will present their profile for review and update.
- Any time they try to create a travel document, if they have not logged onto DTS in 60 days or if their GTCC is due to expire within 60 days, DTS will present their profile for review and update.
- In any active DTS travel document, they can access their profile. They can choose to execute those changes for the active document only or to save them to their permanent profile.

Note: For all the listed options, the person can update most of the information themselves. If a field is grayed-out or read-only, then only a DTA can update the information.

Chapter 2: Working with DTS Profiles

You access DTS at <https://dtsproweb.defensetravel.osd.mil/dts-app/pubsite/all/view/>. Once logged into the system, you can perform administrative actions. The DTS **DTA Maintenance Tool** allows you to manage and maintain your organization's resources. You use the **People** module to locate, create, update, detach, and receive profiles. This document discusses all these options.

1. From the **DTS Dashboard**, mouse over the **Administration** menu (Figure 7-9), then select **DTA Maintenance Tool**. **Note:** You can also use the quick tile to access **DTA Maintenance Tool**.

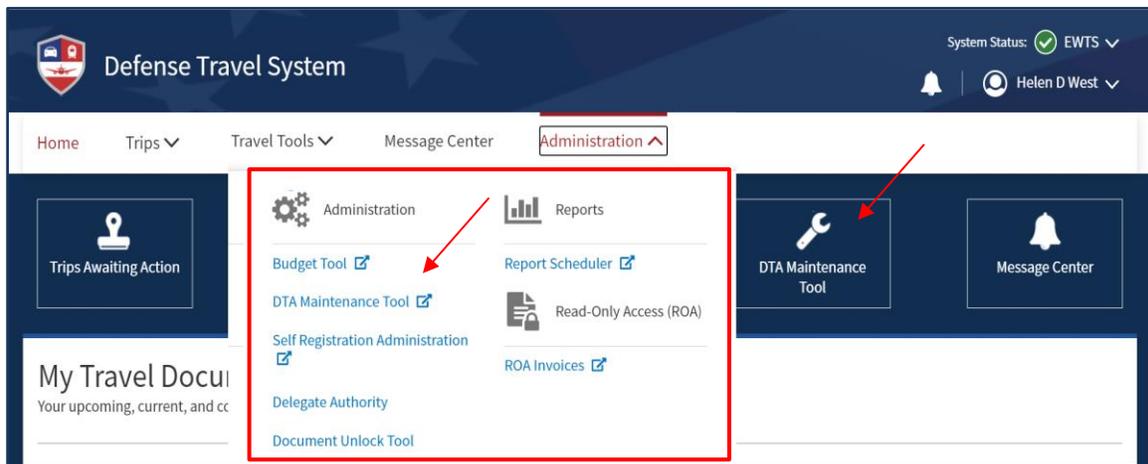


Figure 7-9: DTS Dashboard – Administration Menu

2. The **DTA Maintenance Tool Home** page (Figure 7-10) opens. From the **DTA Tools Bar** (which appears on every screen in the **DTA Maintenance Tool**), you can access all the **DTA Maintenance Tool** modules in which you have permissions, without returning to the **DTS Dashboard**.

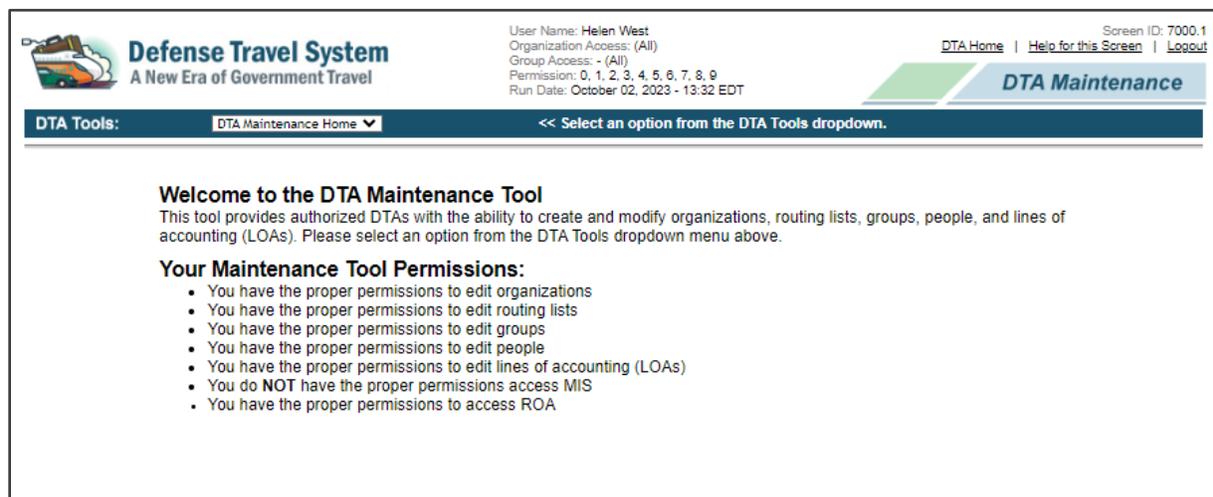


Figure 7-10: DTA Maintenance Tool Home Page

3. Select **People** from the **DTA Tools** drop-down list. The **Search People** screen (Figure 7-11) opens and the **DTA Tools Bar** updates providing options to allow:
 - Search for a profile

- Create a profile
- Receive a profile
- Create a report that shows you the details about a profile

Below is a description of each of these options.

2.1 Search for a Profile

Before you can update a profile, you must find it. To help you do that, the **Search People** screen (Figure 7-11) automatically opens when you open the **People** module. You can also access this screen from any screen within the **People** module by selecting **Search People** in the **DTA Tools Bar**.

The screenshot shows the 'Search People' screen within the 'DTA Tools' bar. The 'People' module is selected. The search form includes the following fields and options:

- Organization Name:** A text field with '(NONE)' entered. A red asterisk indicates it is required.
- Include Sub-Organizations
- Person Type:** A dropdown menu set to 'All'.
- SSN:** A text field.
- Last Name:** A text field.
- First Name:** A text field.
- Organization Access:** A text field.
- Permission Level:** A dropdown menu.

A 'Search' button is located at the bottom of the form. A note at the top of the form states: 'For "Organization Name" and "Organization Access" fields, please enter four or more characters in the corresponding field to display list of available organizations.'

Figure 7-11: Search People Screen

To search for a profile:

1. (Optional) Your main organization's name (based on your organization access) appears by default in the **Organization Name** text field. Change it if you need to search for a profile under a different organization.
2. (Optional) If you want a profile owned by organizations subordinate to the one in the **Organization Name** field, check the **Include Sub-Organizations** box.
3. (Optional) Use the following fields to limit the search result, or skip them to search all profiles.
 - **Person Type:** Limit by profile type – User or User/Traveler.
 - **SSN:** Limit to a single individual - must enter full SSN.
 - **Last Name:** Limit by full or partial name at start of name.
 - **Example:** Enter "ed" to find "Edmonds" and "Edwards" but not "Fredrick".
 - **First Name:** Same as Last Name.
 - **Example:** Enter "ra" to find "Rachel" and "Randy" but not "Clara".
 - **Organization Access:** Limit by the organization to which a person has access or to those who have "No Organization Access".

- **Permission Level:** Limit by a selected permission level.

4. Select **Search**. The screen updates to display your **People (Search Results)** (Figure 7-12).

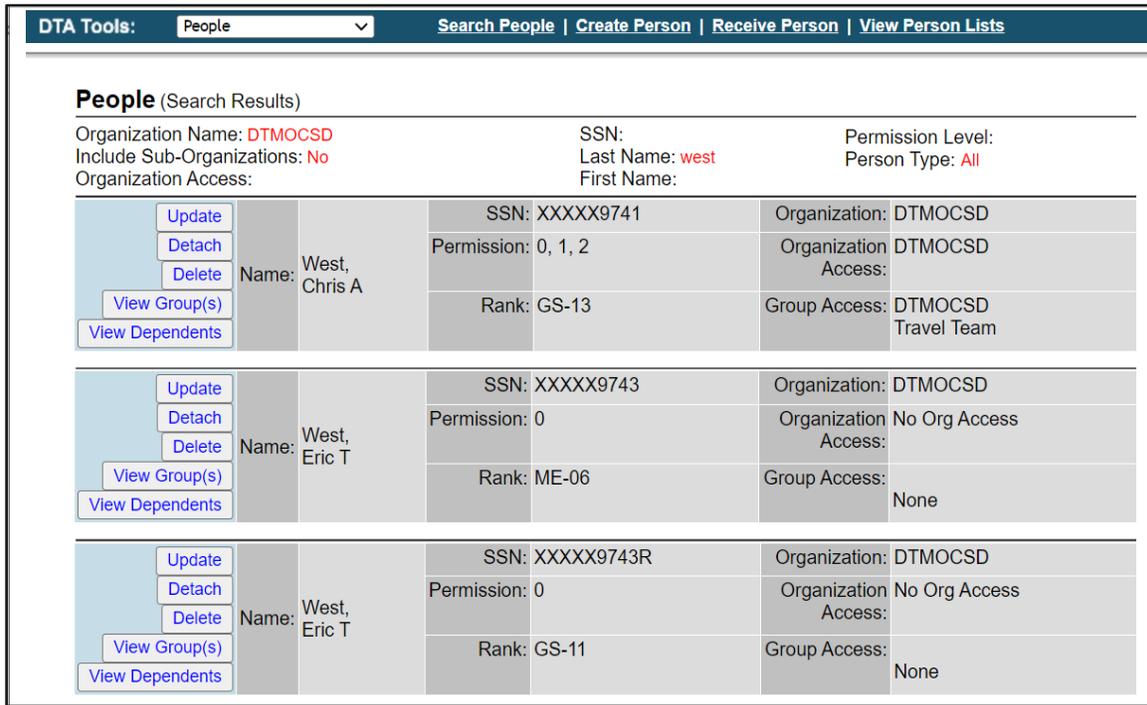


Figure 7-12: People (Search Results) Screen

From this screen, you can **Update**, **Detach**, **View Groups**, and **View Dependents**. Below covers all these different options. **Note:** Delete is not available for selection by DTAs in DTS. See **Delete Profile** Section 2.4 listed below for the delete process.

2.2 Update a Profile

When information changes that can impact a traveler document, you should update the profile to reflect the current information.

To update a personal profile, begin on the **People (Search Results)** screen (Figure 7-12):

1. Select **Update** next to the person's name. The **Update Person** screen (Figure 7-13) opens.

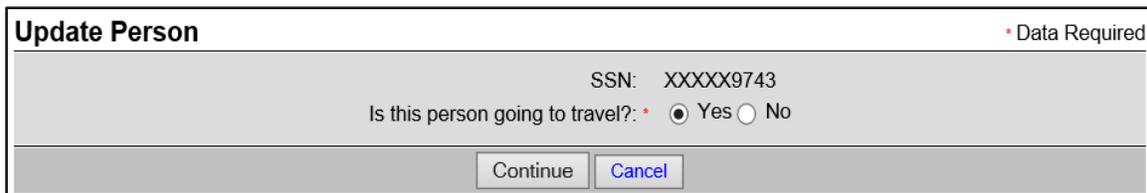


Figure 7-13: Update Person Screen

2. (Optional) The radio button next to **“Is this person going to travel?”** defaults to **Yes**, if the person currently has a user/traveler profile or **No** if the person has a User profile. You can change the profile type by selecting the other radio button.

Note: If you try to change the person’s profile type from a User/Traveler to a User (only) profile, DTS warns you with a pop-up that the traveler information in the profile will be irretrievably lost if you continue. Select **OK** to acknowledge the message and change the profile type. On the other hand, if you try to change the person’s profile type from a User to a User/Traveler profile, you must enter all mandatory traveler fields before DTS allows you to save the updated profile.

3. Select **Continue**. The **Update Profile (User/Traveler)** or **Update Profile (User)** screen opens, depending on which radio button you selected. It displays all the profile information for that profile type. See section 1.2 for detailed information about the personal profile types.
4. Make all necessary changes.

Note: DTS uses permission levels, accesses, and special role indicators to limit a person’s ability to use certain modules and functions. You must determine which permission levels, roles, and accesses the person needs to accomplish their duties, and only assign the necessary items. See the [DTA Manual, Chapter 3](#) for much more information about permission levels, roles, and accesses.

5. Select **Save Person**. The **People (Search Results)** page display (Figure 7-12).

2.3 Detach a Profile

DTS has a two-step process for moving a person between organizations, when one DTA does not have organization access to both the losing and gaining organizations. The first step happens when a DTA at the losing organization detaches the person’s profile. The second step happens when a DTA at the gaining organization receives the profile. For more on the receiving step of the process, see Section 2.8.

When a profile is detached, it is moved into what DTS refers to as the “None” organization. Many DTAs consider this state as, “belonging to the None Org.”

When a profile is detached:

- There is no organization of assignment, routing list, LOAs and Budgets associated to the profile. **Note:** Without an assigned organization, document creation is not permitted for a detached profile.
- Permission levels, roles, and accesses are revoked, so the individual loses access to DTS.
- An Authorizing Official’s profile who **Delegated** their **Signature Authority** to another AO is no longer delegated.
- The Global Group Membership Rules (GGMR) that belong to the losing organization, however, continue to affect the detached profile until the new organization receives it.

Note: DTAs should follow their Component or Local business rules for granting, tracking, and revoking for designated Individuals who hold a specialized role (e.g., Routing Officials, DTAs). Be sure to remove Routing Officials from routing lists and replace with new Routing Officials, if available.

Here is how to detach a person’s profile from your organization:

1. From the **People (Search Results)** screen (Figure 7-12), view the profile. Select **Detach** next to the name of the person you want to remove. The **Detach Person** screen (Figure 7-14) opens. Verify the full SSN.

Detach Person	
Name:	Nguyen, Andreas
SSN:	111141111
Rank:	
Permission Level:	
Organization Name:	DTMOCS
Organization Access:	No Org Access
Group Access:	None
<input type="button" value="Detach"/> <input type="button" value="Cancel"/>	

Figure 7-14: Detach Person Screen

2. Select **Detach**. The **People (Search Results)** screen refreshes with no names on the list. **Note:** If you need to retrieve a detached profile, use the **Receive** option. Enter the full SSN to locate the profile and then assign an organization. Update the profile as needed.

2.4 Delete a Profile

As outlined in section 2.3, the **Detach** option releases a profile from an organization. An Organization or Lead DTA use this function when a traveler no longer requires access to their organization (e.g. traveler changes organizations, retires). The detached profile remains in the “None Org” or “holding bin” indefinitely, until received into a DTS Organization.

Delete operates differently than the **Detach** option. When SSN is invalid, (SSN field is not editable) and the SSN may belong to someone else is when **Delete** profile is an option. Once selected, the traveler profile is removed permanently.

Adhering to travel compliance, the **Delete** action is reserved for those at permission level 8 and used on a *limited* basis. **Note:** DTAs and Component Representatives don't have access to **Delete** a traveler profile.

You as an Organization or Lead DTA should:

1. Verify the SSN is incorrect with the traveler or other supporting records
2. Determine if the invalid SSN profile has associated documents.
3. Follow your local business rules regarding document retention for audit tracking purposes and budgetary accountability.
4. Submit a TraX Help Ticket to request a review for *Personal Profile Deletion*, but only after following your local business rules.

After a validation occurs for a profile with an invalid SSN, the appropriate POC acts:

1. From the **People (Search Results)** screen (Figure 7-12), select **Delete** next to the name of the person whose profile you want to schedule for deletion. The **Delete Person** screen opens (Figure 7-15).

Delete Person

Please note that this users dependants will also be deleted.

Name:	Nguyen, Andreas
SSN:	111141111
Rank:	
Permission Level:	0
Organization Name:	DTMOCSO
Organization Access:	No Org Access
Group Access:	None

Figure 7-15: Delete Person Screen

2. Select **Delete Person**. The **Search Results** screen refreshes. The deleted person's name no longer displays on the list.

Note: After profile removal (e.g., wrong SSN), the DTA must **Create** a new profile for the traveler.

2.5 View Traveler's Groups

To see the traveler's groups:

1. On the **People (Search Results)** screen (Figure 7-12), select **View Group(s)** for the profile. The **Traveler's Group(s) Include** screen (Figure 7-16) opens.

Traveler's Group(s) Include

Name: West, Chris A	SSN:
Organization Name	Group Name
DTMO	DTMO GP
DTMOCSO	CSD
DTMOCSO	Travel Team

Figure 7-16: Traveler's Group(s) Include Screen

2. The screen displays all the groups to which the person belongs; automatic - **Global Group Membership Rules (GGMR)** and manual methods. It is informational only. There are no actions available on this screen (apart from selecting **Close Window** to exit). Meaning you can't remove or add a traveler to a group from the **People** module.

2.6 Dependent Information

Everyone who creates documents for official travel (or has document created for them) in DTS must have a personal profile. When dependents go on official travel, they also need a profile, and DTS provides a straightforward way of creating and maintaining profiles for a person's dependents.

To access dependent information in DTS, from the **People (Search Results)** screen (Figure 7-12), select **View Dependents** next to the sponsor of the person whose dependents you want to see. The **Dependents for**

<traveler> screen (Figure 7-17) opens. If the traveler has any dependent information in their profile, it displays on this screen.

Dependents for West, Chris A			
Add Family Member			
Update	Name: West , George	Date Of Birth (mm/dd/yyyy): 04/16/2012	
Delete		Passport Number:	Expiration Date:
Update	Name: West , Lilly	Date Of Birth (mm/dd/yyyy): 12/12/1990	
Delete		Passport Number:	Expiration Date:

Figure 7-17: Dependents for <Traveler> Screen

2.6.1 Add Dependent Information

To add a family member to a person's profile:

1. On the **Dependents for <Name>** screen (Figure 7-17), select **Add Family Member**. The **Add Family Member** screen (Figure 7-18) opens.

Add Family Member		* Required
First Name: *	<input type="text"/>	
Middle Initial:	<input type="text"/>	
Last Name: *	<input type="text"/>	
Date Of Birth(mm/dd/yyyy): *	<input type="text"/> 	
Relation: *	Spouse <input type="text"/>	
Passport Number:	<input type="text"/>	
Expiration Date:	<input type="text"/> 	
<input type="button" value="Save Person"/> <input type="button" value="Cancel"/>		

Figure 7-18: Add Family Member Screen

2. Enter or select an option for all required fields, and as many optional fields as you want. They are all self-explanatory.
3. Select **Save Person**. The **Dependents for Traveler** screen (Figure 7-17) refreshes. It displays information about the added dependent.

2.6.2 Update Dependent Information

To update a family member's information:

1. On the **Dependents for <Name>** screen (Figure 7-17), select **Update** next to family member whose profile requires a change. The **Edit Family Member** screen appears (Figure 7-19).

Edit Family Member * Data Required

First Name: * Lilly

Middle Initial:

Last Name: * West

Date Of Birth(mm/dd/yyyy): * 12/12/1990

Relation: * Spouse

Passport Number:

Expiration Date:

[Save Changes](#) [Cancel](#)

Figure 7-19: Edit Family Member Screen

2. Change the necessary data.
3. Select **Save Changes**. The **Dependents for Traveler** screen (Figure 7-17) refreshes. It displays the updated information about the dependent.

2.6.3 Delete Dependent Information

To remove a family member's information:

1. On the **Dependents for <Name>** screen (Figure 7-17), select **Delete** next to family member whose profile you need to remove. The **Delete Family Member** screen (Figure 7-20) opens.

First Name: Christine

Middle Initial:

Last Name: West

Date Of Birth(mm/dd/yyyy): 03/22/1985

Passport Number:

Expiration Date:

[Delete](#) [Cancel](#)

Figure 7-20: Delete Family Member Screen

2. Select **Delete**. The **Dependents for Traveler** screen (Figure 7-17) refreshes. The deleted dependent no longer displays.

2.7 Create a Personal Profile

Everyone who accesses DTS must have a profile. If the individual may travel, then create a User/Traveler profile. If the individual will only perform an administrative role, you can create a User profile. **Note:** Follow your Component or Local Business rules for profile creation.

Here is how to create a personal profile in DTS:

1. From the **People** module, select **Create Person** from the **DTA Tools Bar**. The **Create Person** screen (Figure 7-21) opens.

Figure 7-21: Create Person Screen

2. Enter the person’s **SSN**.
3. Next to “**Is this person going to travel?**,” select **Yes** to create a User/Traveler profile, or **No** to create a user profile.
4. Check the **Reserve/National Guard** box, if this profile is for a member of one of those organizations.
5. Select **Continue**. The **Update Profile (User/Traveler)** or **Update Profile (User)** screen opens, depending on which radio button you selected. It displays all the profile information for that profile type. By design, when creating a DTS User or User/Traveler profile, the system auto-grants **Permission Level 0** which is required to access DTS. Although other permissions and accesses may be necessary to complete their functions, at a minimum the individual will have **Permission Level 0**. See Section 1.2 for detailed information about the personal profile types.
6. Make all required entries and as many optional entries as needed.

Note 1: DTS uses permission levels, accesses, and special role indicators to limit a person’s ability to use certain modules and functions. You must determine which permission levels, roles, and accesses the person needs to accomplish their duties, and only assign those items.

Note 2: For a DTA to grant a permission level, organization or group access, within a profile, the DTA must have those options designated within their own profile. Meaning if you need to grant permission level 2, to a Routing Official, then you must have access to permission level 2. That doesn’t mean you will use the permission level to perform the duties as a Routing Official, unless your organization designated you’re that role.

Note 3: When you are setting up a profile, and if the permission level is grayed out or is not visible, or you can’t grant an access, then you should contact a higher level DTA, Site POC, or Component Representative for support.

See [DTA Manual, Chapter 3](#) for much more information about permission levels, roles, and accesses.

7. Select **Save Person**. The **People (Search Results)** screen (Figure 7-12) opens. The details appear for the person you just created.

2.7.1 Designate a Traveler Profile as a Self-AO

Before you can designate someone as a *Self-AO*, check your local business rules for any required training. In DTS, the *Self-AO*’s profile must reflect the specialized role. To do so, set the *Self-AO Approval* radio button to **Yes** and

make sure the permission levels reflect 0 and 2. **Note:** Follow your local business rules for granting permission level 1 (view budget) to AOs.

You may also consider changing the default routing list in the *Self-AO's* DTS profile to be the routing list showing them as a *Self-AO*.

You can find additional information about the DTS User roles in the *DTS Regulations, DoDI 5154.31* and *Self-AOs* in the *DTS Financial Field Procedures Guide*.

2.7.2 Identify a Traveler Profile as Self-AO in a Routing List

A *Self-AO* can approve their own authorizations and be on a routing list as an Approver. Your organization can either designate someone else to serve as an AO for vouchers and local vouchers or instruct the *Self-AO* to use a different routing list, since the *Self-AO* cannot approve their own vouchers or local vouchers.

Figure 7-22 shows a routing list for all document types, with a *Self-AO* (Eric West) designated as an AO for authorizations only. **Note:** You can't tell just by looking at the routing list that the individual is a *Self-AO*. Organizations must follow their local business rules for tracking *Self-AO* roles.

Update Routing List					
Routing List Name: DEFAULT		Default Routing List: Yes		Add Routing Element	
Organization Name: DTMOCSDOPS					
Edit	Document Type	Document Status	Signature Name	Level	Process Name
	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update Remove	Authorization	APPROVED	Helen D West	25	
Update Remove	Authorization	APPROVED	Eric T West	25	←
Update Remove	Local Voucher	APPROVED	Helen D West	25	
Update Remove	Local Voucher	APPROVED	Chris A West	25	
Update Remove	Voucher	APPROVED	Helen D West	25	
Update Remove	Voucher	APPROVED	Chris A West	25	
		Save Changes		Cancel	

Figure 7-22: Update Routing List Screen

Note: For more information on adding, updating, and removing individuals from routing lists, see the [DTA Manual, Chapter 5](#).

2.8 Receive a Profile

You can receive a person who has a DTS profile that a DTA at their previous organization detached (see Section 2.3), but it does not belong to any organization.

As mentioned in Section 2.3, a person with a detached profile has no permission levels, roles, or accesses assigned. They cannot even log into DTS. When a DTA initiates the **Receive Person** steps, the profile assigns to a new organization and that org's **Default Routing List** and **DTA ID** populate into the profile automatically. Based upon the groups specified by the org's GGMRs, the person is automatically a member of the designated groups.

DTS auto-grants **Permission level 0**, so the individual can log into DTS. However, all organization and group access and any specialized roles are set to *none*.

All other profile data remains unaffected by the **Receive Person** action. This means the org specific data (e.g., duty station address, phone number) and traveler unique data (e.g., personal address, email, phone, GTCC, and EFT) must be verified and updated to align with the new organization and traveler's valid information (see Section 2.2, Update a Personal Profile).

If the profile requires org/group access, additional permissions, specialized roles, a routing list (other than the default), and any other org-specific data then after you complete the **Receive Person** steps, you must use **Update** for the profile (See section 2.2, Update a Personal Profile) to modify these items.

To receive a person into one of your organizations:

1. Select **Receive Person** from the **DTA Tools Bar** on any screen in the **DTA Maintenance Tool**. The **Search Person to Receive** screen (Figure 7-23) opens.

Figure 7-23: Search Person to Receive Screen

2. Enter the **SSN** of the person you want to receive.
3. Type the **Receiving Organization Name** – that is, the name of the assigned DTS organization for the person.
4. Select **Search**. The **Receive Person** screen (Figure 7-24) opens.

Figure 7-24: Receive Person Screen

5. Select **Receive Person**. The **People (Search Results)** screen (Figure 7-12) opens. The details appear for the person you just assigned to the organization.
6. Select **Update** to access the profile, make all necessary changes and save the record.

Note: If you try to receive a profile that belongs to another organization, DTS displays a message stating that fact, and provides that organization's DTA ID email address, so you can contact a DTA to request

they detach the profile. If you contact the DTA and the email address is invalid, then submit a TraX Help Ticket to request a new POC contact from the losing organization, so can request profile detach action.

Chapter 3: Person Module Reports

There are four reports or view lists you can run within the Person table, **Basic Traveler Info**, **Accounts Info**, **Special Features Info**, and **Group Info** Lists. See Section 3.1 for details.

3.1 View Person List

Person Lists profiles information in various fields contained in the profiles assigned to your organizations. You can easily review, sort the data, and identify those profiles which require updates. The People module reports to help you manage data are:

- **Basic Traveler Info List.** Contains key information about each traveler, such as his or her name, organization, truncated SSN, permission levels and accesses, profile type, default routing list and LOA, and email address.
- **Accounts Info List.** Displays information about each traveler's financial data, such as their GTCC and EFT information.
- **Special Features Info List.** Shows the granted permission levels and special roles (e.g., NDEA or DMM) for each person.
- **Groups Info List.** Lists the groups (by group name and owning organization) to which each traveler belongs.

To run a **Person Report**:

1. From any screen in the **DTA Maintenance Tool**, **People** module, select **View Person Lists** in the **DTA Tools Bar**. The **View Person List** screen (Figure 7-25) opens.

Figure 7-25: View Basic Traveler Info List Screen

2. (Optional) Your main organization name appears by default in the **Select Organization** (Name) text field. You can enter a different organization instead.
3. (Optional) Check the **Include Sub-Organizations** box to include search results from organizations subordinate the selected organization.

4. (Optional) The **Basic Traveler Info List** appears by default in the **Select Report** field. Select the report you need to run, so you can review the findings.
5. Select **Run Report**. DTS prompts you to open or save the report. The option you select determines whether DTS downloads the report to your computer or displays it in an Excel spreadsheet.

Chapter 4: The DTA Manual: Contents & Links

DTA MANUAL CHAPTER: TOPIC	URL
Chapter 1: DTS Overview	https://media.defense.gov/2022/May/11/2002994773/-1/-1/0/DTA_1.PDF
Chapter 2: DTS Access	https://media.defense.gov/2022/May/11/2002994797/-1/-1/0/DTA_2.PDF
Chapter 3: DTS Site Setup	https://media.defense.gov/2022/May/11/2002994799/-1/-1/0/DTA_3.PDF
Chapter 4: Organizations	https://media.defense.gov/2022/May/11/2002994824/-1/-1/0/DTA_4.PDF
Chapter 5: Routing Lists	https://media.defense.gov/2022/May/11/2002994853/-1/-1/0/DTA_5.PDF
Chapter 6: Groups	https://media.defense.gov/2022/May/11/2002994838/-1/-1/0/DTA_6.PDF
Chapter 7: People	https://media.defense.gov/2022/May/11/2002994837/-1/-1/0/DTA_7.PDF
Chapter 8: LOAs	https://media.defense.gov/2022/May/11/2002994836/-1/-1/0/DTA_8.PDF
Chapter 9: Budgets	https://media.defense.gov/2022/May/11/2002994835/-1/-1/0/DTA_9.PDF
Chapter 10: Reports	https://media.defense.gov/2022/May/11/2002994832/-1/-1/0/DTA_10.PDF
Chapter 11: MIS Administration	https://media.defense.gov/2022/May/11/2002994834/-1/-1/0/DTA_11.PDF
Chapter 12: ROA Administration	https://media.defense.gov/2022/May/11/2002994833/-1/-1/0/DTA_12.PDF

DTA MANUAL APPENDIX: TOPIC	URL
Appendix A: Self-Registration	https://media.defense.gov/2021/Nov/15/2002893136/-1/-1/0/DTA_APP_A.PDF

Appendix B: Acronyms	https://media.defense.gov/2021/Nov/15/2002893141/-1/-1/0/DTA_APP_B.PDF
Appendix C: Definitions	https://media.defense.gov/2021/Nov/15/2002893143/-1/-1/0/DTA_APP_C.PDF
Appendix E: Emails	https://media.defense.gov/2021/Nov/15/2002893222/-1/-1/0/DTA_APP_E.PDF
Appendix F: Import / Export Module	https://media.defense.gov/2021/Nov/15/2002893234/-1/-1/0/DTA_APP_F.PDF
Appendix G: Error Codes	https://media.defense.gov/2021/Nov/15/2002893232/-1/-1/0/DTA_APP_G.PDF
Appendix J: Help Process	https://media.defense.gov/2021/Nov/15/2002893231/-1/-1/0/DTA_APP_J.PDF
Appendix K: DTS Tables	https://media.defense.gov/2021/Nov/15/2002893230/-1/-1/0/DTA_APP_K.PDF
Appendix L: Reorganizations	https://media.defense.gov/2021/Nov/15/2002893229/-1/-1/0/DTA_APP_L.PDF
Appendix M: Ranks and Grades	https://media.defense.gov/2021/Nov/15/2002893228/-1/-1/0/DTA_APP_M.PDF
Appendix N: Country Codes	https://media.defense.gov/2021/Nov/15/2002893227/-1/-1/0/DTA_APP_N.PDF
Appendix Q: Org Naming Sequence	https://media.defense.gov/2021/Nov/15/2002893226/-1/-1/0/DTA_APP_Q.PDF
Appendix R: LOA Formats	https://media.defense.gov/2021/Nov/15/2002893225/-1/-1/0/DTA_APP_R.PDF