

Manually Group Travelers

Any time you receive a traveler, you will need to manually add them to your group.

*****All Cross Orgs that the FDTA completes, the traveler must be grouped*****

You will need the Full SSN in order to group them.

Open the DTA Maintenance Tool within DTS

1. Select “Groups” from the dropdown
2. Look under “Individual Group Members” and click “Add” to group the individual manually to your Group in DTS
3. Fill in the blanks on the window that opens, starting with verifying the name of your organization and the org’s group name. Enter the traveler’s SSN.
4. Click the “Add Member” button
5. The bottom pic is the window that opens after a traveler has been grouped. This one shows the traveler was grouped to DM6105 at the top in red font. Beneath it shows the traveler name, partial SSN and the organization the traveler belongs to and that it was a manual add to the group.
6. If a traveler has already been added to your org’s group, there will be a message across the top of the screen that says “this person has already been manually added to your group”

The screenshot shows the 'Add Individual Group Member' form. At the top, there is a navigation bar with 'DTA Tools:' and a dropdown menu set to 'Groups'. Below this are three tabs: 'Group(s)', 'Individual Group Members', and 'Global Membership'. The 'Individual Group Members' tab is active, showing 'Search | Add | View List'. The form itself has a title 'Add Individual Group Member' and a note: 'For "Organization Owner Name" please enter four or more characters in the corresponding field to display list of available organizations and corresponding group names.' There are three callout boxes: '1' points to the 'Groups' dropdown, '2' points to the 'Add' button in the 'Individual Group Members' tab, '3' points to the 'Organization Owner Name' field (containing 'DM') and the 'Group Name' dropdown (set to 'None'), and '4' points to the 'Add Member' button. The 'Member SSN' field is empty, and there is a 'Search' button next to it. At the bottom of the form are 'Add Member' and 'Cancel' buttons.

The screenshot shows the search results for an individual group member. At the top, there is a navigation bar with 'DTA Tools:' and a dropdown menu set to 'Groups'. Below this are three tabs: 'Group(s)', 'Individual Group Members', and 'Global Membership'. The 'Individual Group Members' tab is active, showing 'Search | Add | View List'. The search results are displayed under the heading 'Individual Group Member(s) (Search Results)'. A note says: 'For "Organization Owner Name" please enter four or more characters in the corresponding field to display list of available organizations and corresponding group names.' There are five callout boxes: '5' points to the search results. The search results show: 'Organization Owner Name: DM6105', 'Group Name: DM6105', 'Member SSN: 123456789', 'Member Last Name: [redacted]', and 'Member First Name: [redacted]'. Below this is a table with columns: 'Edit', 'Member Name', 'Member SSN', 'Member Organization', and 'Add Method'. The table contains one row: 'TRAVELER, IMMA', 'XXXXX6789', 'DA76003CFTH1CD1SB', and 'Manual'. There is a 'Remove' button next to the 'Edit' button. At the bottom of the table is '1 - 1 of 1'.

Edit	Member Name	Member SSN	Member Organization	Add Method
Remove	TRAVELER, IMMA	XXXXX6789	DA76003CFTH1CD1SB	Manual