

## MASS AFFILIATION

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## Purpose: To demonstrate how to mass affiliate subjects.

## MASS AFFILIATION

## How to Mass Affiliate

The process for mass affiliating many subjects at once is similar to the process for mass initiating. Both mass affiliation and mass initiation support the creation of multiple subject case requests at once by uploading a CSV spreadsheet list of subjects. This capability is available to users with the Mass Initiator, Subject Manager, and Facility Security Officer roles.

- 1. From the Left Navigation Menu, select **Subject Management**.
- 2. Select Mass Initiate Subjects from the Actions drop-down.

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Р	Task Management	ask Management							
ē	Visit Management	My Sub	My Subject List						
	Subject Management	Subjects in Search	your organization are list	ed below. To include	all subjects in your hierarchy	, select the checkbox. Select the Advar	nced Search link to specify fields	to searce Mass Initiate Subjects	
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٥	Order Form Library	Advanced : Total Resul	<u>Search</u> I <b>ts:</b> 446						
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U	Error Management	10101	Dracula	Thomas	Romania	Department of Security Managers 2/1005Q, Department of Security Managers 1/1005P			
		10000	Rivera	Franklin	Mexico	Department of Security Managers 1/1005P, Department of Security Managers 2/1005Q	Top Secret	Active	
		1000	Batman	Robin	United States, Kuwait	Office of Security Programs/1007F	Top Secret	Active	
			Farrell	Will	Brazil	Office of Security Programs/1007F			
		1000	Jetson	George	United States	Office of Security Programs/1007F			
		100.1	Archer	Mallory	United States	Office of Security	None	Active	*

3. In the Setup Organization Associations page, select the **+Add Owning Organization hyperlink**.

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til Reports	No items	
(i) Error Management	Mass Initiation Template	
	Please use the CSV format provided in the template file. Download Template File Download Mass Initiation Resources Create subjects only and skip initiation	
		_
	Cancel	Continue

4. Select the **Residing Organization**, **Affiliation**, and the **ellipses** to Add Servicing Organization (if applicable) or select **View Office Details**.

National Background Inve	estigation Services			2	Search Subject by SSN 🔍 💿 💭
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<ol> <li>Error Management</li> </ol>	Mass Initiation Template				Delete
	Please use the CSV format provided in the template file. Download Template File Download Mass initiation Resources Create subjects only and skip initiation				
	Cancel				Continue

- 5. Download the **Mass Initiation CSV Template File** and **Mass Initiation Resources** file, add the subject's data to the template, and save the file for uploading.
- 6. Select the **Create subjects only and skip initiation** checkbox to perform mass affiliation and only create the subjects without initiating.
- 7. Select Continue.

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Subject Management	Setup Org Associations							
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<ol> <li>Error Management</li> </ol>	Mass Initiation Template				Delete			
	Please use the CSV format provided in the template file. Download Template File Download Mass initiation Resources Create subjects only and skip initiation							
	Cancel				Continue			

- 8. Select Upload File to upload the documents.
- 9. Select Continue.

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	Subject Management	Upload File		
ሌ (	Org Management	<i>Please use the CSV format provided in the template file.</i> <u>Download Template File</u>		
	Order Form Library	Download Mass initiation Resources		
\$ \$	System Settings	Upload file		
oll F	Reports			
(i) E	Error Management	Cancel Back		Continue
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**Note:** After uploading the file, the CSV spreadsheet is automatically validated and checked for errors. Errors and warnings are displayed in the application. The subjects with errors will not be processed and instead will need to be created and affiliated on their own.

- 10. Select the **Error** or **Warnings** tabs to display the errors or warnings, if applicable.
- 11. From the Details column, select **View** to display additional information about the subject and errors.

😡 National Background Investigation Services							
Ø Dashboard	Mass Initiation (MI-4E-DCSA-79) OPERAVALIDATED						
P Task Management	Associated Organization Workflow Tune	Form Tune	Template Name				
📅 Visit Management	Defense Counterintelligence and Security Agency Mobile Tech Test Form Routing	SF86	Test Order Form Template				
Subject Management	<ol> <li>1. Setup Org Associations</li> <li>2. Setup Tier and Template</li> <li>3. Upload File</li> </ol>						
ని Org Management	Validation Results						
D Order Form Library			Validated 2 / 2 Records 🔾				
System Settings	Valid (2) Warning (0)						
<sub>0</sub> ]] Reports	Unselect All SSN 🐺 Full Name 🛒 Email address	Date Of Birth 📃 Place Of Birth					
Error Management	Elf on the Shelf Sr.	12/31/1999 Christmas Town, Virginia	United States <u>View</u>				
	Snoop on the Stoop Sr.	1/1/1980 Compton, California	United States <u>View</u>				
	Cancel Back		Start Processing				

12. Select Start Processing to Mass Affiliate the subjects.

