



## 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.

Search Subject by SSN

Subject Management

My Subject List

Subjects in your organization are listed below. To include all subjects in your hierarchy, select the checkbox. Select the Advanced Search link to specify fields to search.

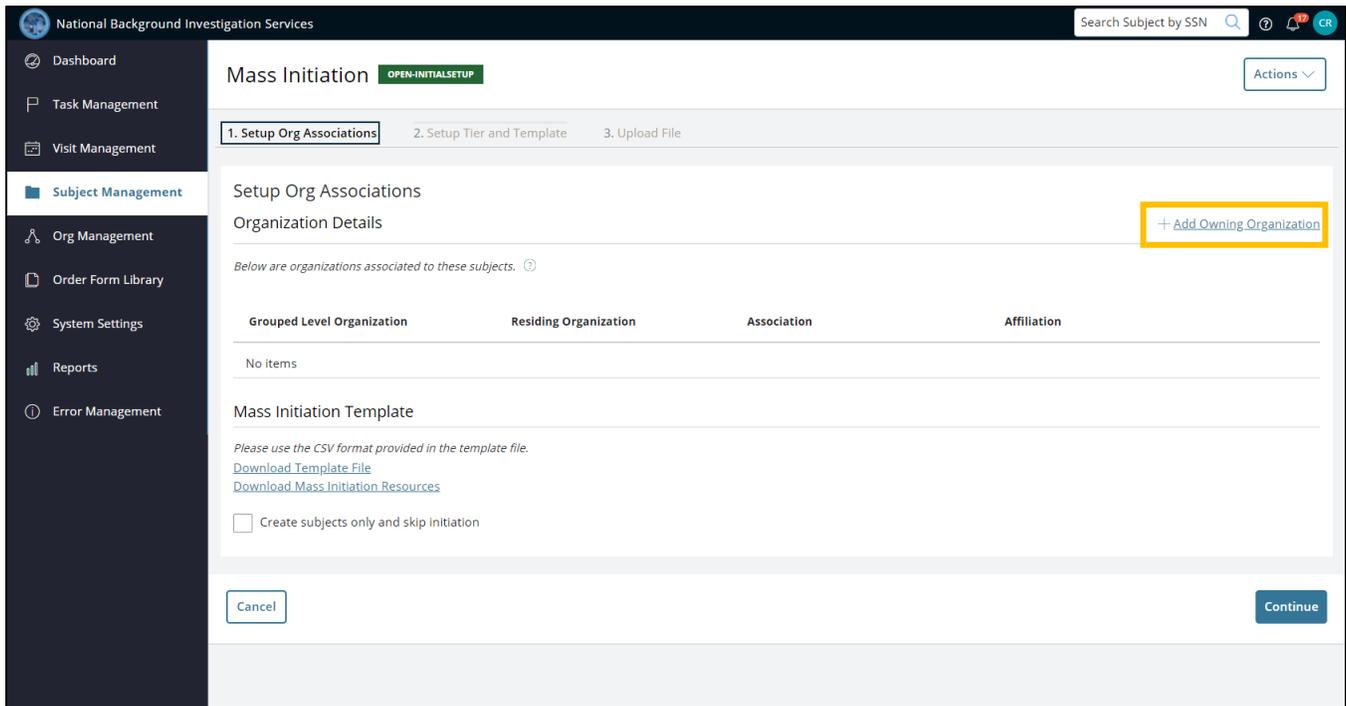
Search on All Fields  Include Subjects in My Hierarchy

Advanced Search

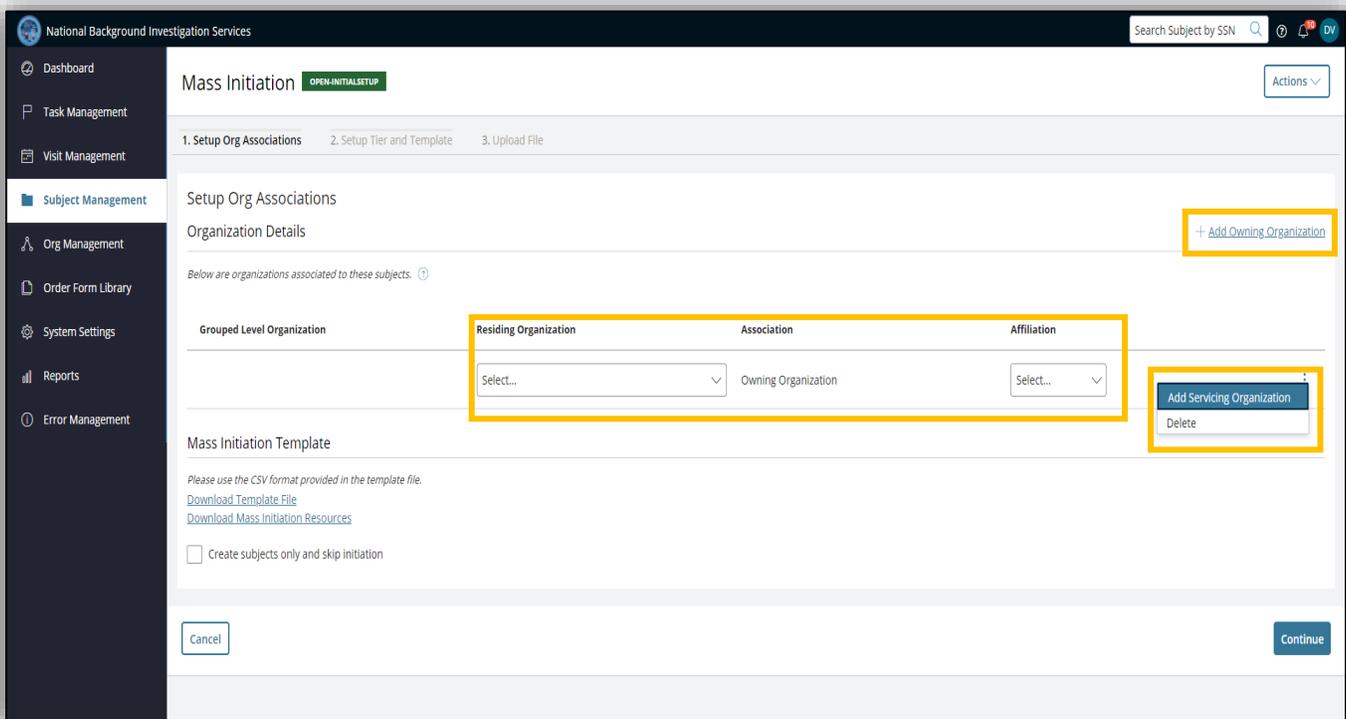
Total Results: 446

SSN	Last Name	First Name	Citizenship	Organization	Determination	Determination Status
[REDACTED]	Borat	Harvey	Hungary	Department of Security Managers 1/1005P	---	---
[REDACTED]	Dracula	Thomas	Romania	Department of Security Managers 2/1005Q, Department of Security Managers 1/1005P	---	---
[REDACTED]	Rivera	Franklin	Mexico	Department of Security Managers 1/1005P, Department of Security Managers 2/1005Q	Top Secret	Active
[REDACTED]	Batman	Robin	United States, Kuwait	Office of Security Programs/1007F	Top Secret	Active
[REDACTED]	Farrell	Will	Brazil	Office of Security Programs/1007F	---	---
[REDACTED]	Jetson	George	United States	Office of Security Programs/1007F	---	---
[REDACTED]	Archer	Mallory	United States	Office of Security Programs/1007F	None	Active

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



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



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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Search Subject by SSN

### Mass Initiation OPEN-INITIALSETUP

Actions

1. Setup Org Associations 2. Setup Tier and Template 3. Upload File

#### Setup Org Associations

Organization Details [+ Add Owning Organization](#)

Below are organizations associated to these subjects.

Grouped Level Organization	Residing Organization	Association	Affiliation
	Select...	Owning Organization	Select...

[Add Servicing Organization](#)  
[Delete](#)

#### Mass Initiation Template

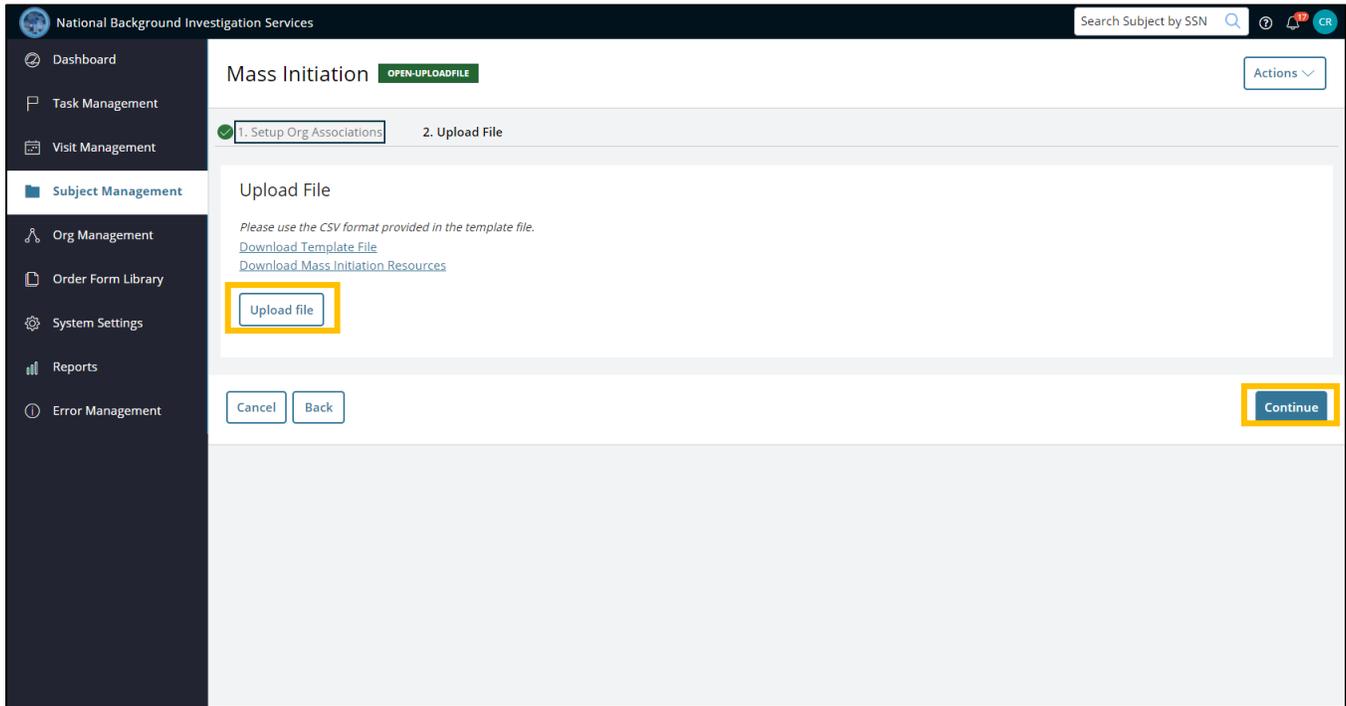
Please use the CSV format provided in the template file.

[Download Template File](#)  
[Download Mass Initiation Resources](#)

Create subjects only and skip initiation

[Cancel](#) [Continue](#)

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



**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.
12. Select **Start Processing** to Mass Affiliate the subjects.

National Background Investigation Services

Search Subject by SSN

Mass Initiation (MI-4E-DCSA-79) **OPEN-VALIDATED** Actions

Associated Organization: Defense Counterintelligence and Security Agency  
 Workflow Type: Mobile Tech Test Form Routing  
 Form Type: SF86  
 Template Name: Test Order Form Template

1. Setup Org Associations 2. Setup Tier and Template 3. Upload File

Validation Results Validated 2 / 2 Records

Valid (2)	Warning (0)						
Unselect All	SSN	Full Name	Email address	Date Of Birth	Place Of Birth	Citizenship	Details
<input checked="" type="checkbox"/>	[REDACTED]	Elf on the Shelf Sr.	[REDACTED]	12/31/1999	Christmas Town, Virginia	United States	<a href="#">View</a>
<input checked="" type="checkbox"/>	[REDACTED]	Snoop on the Stoop Sr.	[REDACTED]	1/1/1980	Compton, California	United States	<a href="#">View</a>

Cancel Back Start Processing

