CHAPTER 3: GROUP AUTHORIZATIONS FOR TEMPORARY DUTY TRAVEL

DTS enables travel details to be entered and approved on one authorization when two or more travelers travel together to the same TDY location. The purpose of a group authorization is to enter and approve as much information as possible for all travelers on one document, yet allow each traveler in the group to create a separate voucher after the trip.

The individual who creates the group authorization can be a Non-DTS entry agent (NDEA) or a primary traveler who has group access for all of the travelers who will be traveling. The NDEA identifies one person as the primary traveler and selects additional travelers. Many of the steps shown in this chapter are identical to those discussed in Chapter 2 for creating a standard TDY authorization.

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3.1 Group Authorization Process Overview

The local business rules for an organization determine the process for how an authorization for group movement is created. The below sequence identifies typical steps used to create a group authorization in DTS for groups of nine or fewer travelers.

1. The NDEA or primary traveler:
   a. Creates the itinerary
   b. Identifies the travelers
   c. Selects the preferred reservations
   d. Sends reservation requests via e-mail sent through DTS
   e. Identifies all lines of accounting (LOAs)
   f. Distributes costs
   g. Justifies pre-audit flags
   h. Stamps document <SIGNED>
   i. (If necessary) adjusts or amends the document to reflect the actual costs returned by the CTO

2. The CTO books the reservations and sends an e-mail to the primary traveler with the reservation information and costs.

3. DTS routes the group authorization to the Authorizing Official (AO) for approval.

4. The AO applies the APPROVED stamp to the group authorization.

5. The group authorization spawns individual authorizations that appear as view-only in each traveler's document list. The primary traveler may make amendments as necessary to the group authorization.

6. If the AO approves an amendment in the group authorization, the change updates in the individual authorizations.

7. The primary traveler may lock the group authorization when all amendments affecting all travelers have been made. If the primary traveler fails to lock the group authorization, DTS automatically locks the group authorization three days after the trip end date.

8. Travelers may make amendments to their individual authorizations, if necessary.

9. Travelers create individual vouchers.
The Group Authorization Process Flow is shown in Figure 3-1.

Figure 3-1: Group Authorization Process Flow

*Group authorizations for 10 or more travelers may route to the Transportation Officer (TO). The following steps are added to the process:
1. TO enters transportation information on the Other Trans. screen.
2. TO applies REVIEWED GROUP AUTH stamp.
3. Group authorization continues routing process.

**SPPs will not be paid until document is locked.
3.2 Create a Group Authorization

Many steps in creating a group authorization are the same as those used to create an authorization. The main differences are as follows:

Select travelers. This is an extra step that the NDEA or primary traveler identifies the total number of travelers and identifies them by name before the AO approves the document. You may create a travel team for individuals who travel together frequently. See Section 3.2.2 for details about DTS Travel Teams.

* In this chapter, “you” refers to the actions that the NDEA or Primary Traveler will perform.

Request reservations. When you request reservations in a group authorization, the reservations are always booked outside of DTS, though who books them depends on the number of travelers and whether a CTO is available. Local business rules should be observed when requesting reservations for a group.

Users at sites without DTS connectivity to the CTO must communicate with the travel office by telephone, fax, or e-mail to request the reservations. The CTO books the reservations and contacts the primary traveler with the details that need to be entered in DTS. The primary traveler may request the reservations and create the group authorization after the CTO has provided the reservation details and costs.

Beginning on the DTS User Welcome screen (Figure 3-2), follow the below steps to create a group authorization:

![Figure 3-2: DTS User Welcome Screen](image-url)
1. Mouse over **Official Travel** on the menu bar.

2. Select **Group Authorizations/Orders** from the drop-down list.

The Group Authorizations/Travel Orders screen opens (Figure 3-3).

![Group Authorizations/Travel Orders Screen](image)

Figure 3-3: Group Authorizations/Travel Orders Screen
<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Name</strong></td>
<td>Label created for a group authorization using your initials, destination location, date of departure, and _G01 suffix (EWNORFOLVA061515_G01) indicating the document is a group authorization. The -01 indicates document is an amendment to group authorization. After the group authorization has been approved the document name displays as a link. The link opens the Traveler List screen.</td>
</tr>
<tr>
<td><strong>Departure Date</strong></td>
<td>Column header that indicates the trip start date for the group authorization. Documents sort by this column by default.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Column header for the name of the last stamp that was applied to the document.</td>
</tr>
<tr>
<td><strong>TA Number</strong></td>
<td>Column header for the travel authorization numbers for your document.</td>
</tr>
</tbody>
</table>
| **View/Edit**          | Column header displays ways to edit or view a document.  
  • View - The document has either been approved by the AO or the group authorization has been locked (only individual authorizations are available to edit).  
  • Edit - The group authorization is not yet signed and may still be adjusted.  
  If view/edit displays, the document has already been signed, but not yet approved; it is still available for adjustment. |
| **Print**              | Column header and name of the link used to print a copy of the traveler’s individual authorization in plain text format.                                                                                                                                                                                                                   |
| **Lock Group**         | Column displays three features:  
  • Remove indicates that the document has not been signed. Selecting the link deletes group authorization.  
  • Lock Group indicates individual authorizations have not yet been made available for the travelers to edit. Selecting the link allows amendments and vouchers to be made from the traveler’s authorization.  
  • Group Locked indicates that the individual authorizations have been made available to travelers and that the group authorization is no longer available to edit. |
| **Amend**              | Displays the amend link. When amend displays, the AO has approved the group authorization. Selecting amend opens the Create Amendment screen that allows the group authorization to be edited.                                                                                                                                                   |

3. Select **Create New Group Authorization/Order**.
Chapter 3: Group Authorizations For Temporary Duty Travel

A pop-up window opens (Figure 3-4), and recommends review of DTS training material for Group Travel.

![Create Group Authorization Pop-Up Window](image)

Figure 3-4: Create Group Authorization Pop-Up Window

4. Select **OK**.

**3.2.1 Enter Itinerary Information**

Start the group authorization by completing the Trip Overview screen (Figure 3-5). This screen is completed as if you were creating an individual authorization.

*Note: If you will be TDY to a military installation, the Lodging selection button is automatically selected. You will not be able to unselect it.*
Figure 3-5: Trip Overview - Itinerary Screen (TDY to Military Installation)
3.2.2 Select Travelers

After you complete your itinerary, you will be taken to the Group Travel Selection screen. Select the travelers to be included in the group authorization (Figure 3-6). You will only be able to select travelers you have group access to. If you do not have all the traveler’s names, you can continue creating the authorization. Reservations can be made and expenses allocated based on the number of travelers indicated. You will need all their names in order for the AO to approve the authorization.

The left side of this screen presents three ways to add travelers to a group authorization. You will be able to view all available travelers (based on group access). You can search for travelers using their SSN, or their last name. You may select a travel team if one has been created. The right side of the screen displays a list of the selected travelers.

Figure 3-6: Traveler Selection Screen
Follow the below steps to select travelers for a group authorization:

1. Complete the **Last Name** field and choose **Search**.
   -OR-
   Select **View All Available Travelers** and check the box by the name of the traveler in the Available Travelers List.

2. Select **Save Selected Travelers to Group** at the bottom of the screen.

The selected names display on the right side of the screen. Select **Remove** to remove a traveler’s name from the group authorization.

If this is the first time any traveler has had a document created in DTS, a prompt will appear to update their profile(s).

3. Select the **Routing List** drop-down list on the right side of the screen and select the appropriate routing list.

4. Complete the **Total Traveler(s)** field with the number of travelers to be included in the group authorization.

   **Note:** The **Total Traveler(s)** field will be filled in automatically. If there is a total of eight travelers will be traveling, but you only have six names, enter “8” in the **Total Traveler(s)** box. The number “2” will display in the **Undefined Travelers** field. It is possible to create a group authorization that contains undefined travelers, but all travelers must be identified i before the AO can approve it.

5. Select the **radio button** next to the name of the person who will serve as the primary traveler (if other than indicated by the asterisk in the Primary column).

6. Select **Proceed**.

### 3.2.3 Request Air Reservations

If you identify that air reservations are needed for the group authorization, the Travel module will open for the type indicated (Figure 3-7). For further guidance on the Travel module, see Chapter 2, Section 2.6 of this manual.

If your group is authorized to use air travel, you will select air reservations for the entire team. After you select the air reservations, DTS will send an email to your CTO requesting they book the reservations you selected.

Although the interaction with DTS has the same look and feel as adding reservations to an authorization, you are only identifying *preferences*.
3.2.4 Request Lodging Reservations

If you are performing your TDY at a military installation, the Lodging indicator on the Itinerary screen was automatically selected. If you request air reservations, you will see the Lodging screen after completing the air request.

When the **Lodging** screen opens (Figure 3-8), the **DoD Lodging** tab is available and available Government lodging is shown. Choose the **Select Hotel** button next to the lodging name to select the hotel and make reservations.
After choosing the Hotel, the room selection screen opens (Figure 3-9), Choose Select Room to book room reservations.
If you will not be staying at the Government lodging, you must select the **Decline DoD Lodging** button located at the top right above the green reservations block. After you select **Decline DoD Lodging**, a pop-up will appear (Figure 3-10).
Figure 3-10: DoD Lodging Pop-up Warning

Select **OK**, and DTS will take you to available lodging under another available tabs (Figure 3-8).
After completing the reservation process, the Trip Summary screen opens (Figure 3-11). In the top right corner of the Trip Summary screen there are two links that may be used to e-mail or print the itinerary.

![Trip Summary Screen](image)

Figure 3-11: Trip Summary Screen

### 3.2.5 Expenses

Enter all expenses that you anticipate will be shared by the group. Expenses will be distributed among the group members, when the group authorization is signed.
3.2.6 Lines of Accounting
A group authorization must have correct lines of accounting (LOA). You can add a LOA by going to the accounting screen. The LOA is not required when creating the group authorization; but, the AO cannot approve the document until it contains an LOA. For further guidance on LOAs, see Chapter 2, Section 2.8 of this manual.

3.2.7 Additional Options
The Additional Options module in DTS allows the primary traveler to perform actions pertaining to Group Traveler, Profile, Partial Payments, and Advances. These features display on the sub-navigation bar.

3.2.7.1 Group Travelers
Travelers that are listed on the group authorization, can be view on the Group Travel Selection screen. More information on using this screen to add travelers, change the routing list, edit the total number of travelers, and remove selected travelers is located in Section 3.2.2.

3.2.7.2 Profile
This screen allows you to update the personal profile for any member of the group for this document.

3.2.7.3 Scheduled Partial Payments (SPPs)
When a trip is scheduled to exceed 45 days, you can request partial reimbursement before the trip is complete. The SPP feature sets up payments every 30 days for estimated expenses claimed on the authorization. SPPs requested on the initial group authorization will affect only the primary traveler. Other travelers who require SPPs must wait until the AO approves the group authorization. Each traveler will receive an individual authorization that can be amended to request SPPs.

3.2.7.4 Non-ATM Advances
Non-ATM advances are not permitted for group authorizations.

3.2.8 Review and Sign
To review and sign a group authorization in DTS, you need to review or complete each of the below sections before signing the document.

- Distributions
- Preview
- Other Auths.
- Pre-Audit
- Digital Signature

3.2.8.1 Distributions
The Distributions section allows access to the Cost Distribution screen (Figure 3-12). This screen allows you to view and update the cost distribution of mileage and non-mileage expenses or ticketed transportation costs. All items in the group authorization that have a dollar amount can be distributed to individual travelers. The distribution of expenses is required before the AO approves the group authorization. You or any Routing Official may make the distributions.
The Distributions screen is divided into two sections. The Cost Distribution section on the left side of the screen explains the cost distribution of the entered expenses. The left side of the screen also explains the Expenses Summary on the right side of the screen.

The data elements that can be displayed in the Expenses Summary are shown at the top of the Expenses Summary section. DTS defaults to the No radio button, meaning that only undistributed expenses display. You may select the Yes radio button to see all expenses that have been distributed.

Once an expense has been distributed, DTS automatically moves it to Distributed Expenses.

To distribute an expense, follow the below steps:

1. Select **Edit** to the left of the expense name.
The expense you select opens on the left side in the **Cost Distribution** section (Figure 3-13).

![Figure 3-13: Cost Distribution Screen](image)

2. Select the **Distribution Method** drop-down list arrow and choose the method of distribution.
3. Place a check in the **Distribute to All Travelers** box if each traveler will be allocated a portion of the expense. Although this box is visible regardless the distribution method, you can only place a check in the box if you choose **Equal** or **Amount**.

The screen refreshes and allows use of the selected allocation method. The fields and boxes next to the traveler's names specify the method selected.

4. Place a check in the box to the left of the name of each traveler who is responsible for paying the selected expense, to distribute by the **Equal** or by the **Single Traveler** method.
   - OR-
     Complete the **Cost** field with the dollar amount that each traveler will pay
   - OR-
     Complete the **Percent** field with the percentage that each traveler will pay.

5. Select **Save Distribution**.

6. Repeat the above steps until all expenses are distributed.
3.2.8.2 Preview Trip

The Preview Trip screen allows you to review the travel data. You may enter comments for anyone in the routing chain to review. Select Preview from the subnavigation bar. The Preview Trip screen opens (Figure 3-14).

Figure 3-14: Preview Trip Screen - Top
The steps to use the Preview Trip screen in a group authorization are the same as those used in a TDY authorization. See Chapter 2, Section 2.10.1 of this manual for instructions on how to review the entered travel data and provide comments to the AO and the TO.

### 3.2.8.3 Other Authorizations

If the group authorization requires remarks to the AO for any additional authorizations, the remarks will be requested on the Other Authorizations screen (Figure 3-15). This screen may also be used to add additional authorizations to the group authorization. See Chapter 2, Section 2.10.2 of this manual for guidance on entering remarks and adding other authorizations.

![Figure 3-15: Other Authorizations Screen](image-url)
3.2.8.4 Pre-Audit Trip

The Pre-Audit Trip screen displays any items in the group authorization that require justification (Figure 3-16). Advisory notices are shown to bring attention to certain items, but do not require explanations. You must view and enter justifications before DTS will allow you to sign the authorization.

Figure 3-16: Pre-Audit Trip Screen
3.2.8.5 Digital Signature

The final step in creating your group authorization is to digitally sign the document on the Digital Signature screen (Figure 3-17). Completing this step begins the routing process. The default stamp is SIGNED. See Chapter 2, Section 2.10.4 of this manual for guidance on the digital signature process.

Figure 3-17: Digital Signature Screen

If the reservation requests have not yet been e-mailed to the CTO, a pop-up message displays when you try to sign the group authorization. This message asks if DTS should send the request e-mail to the CTO.

1. Select **OK** to send the e-mail.
   -OR-
   Select **Cancel** to sign the group authorization without sending an e-mail through DTS.
If you select **OK**, the CTO Email screen opens (Figure 3-18).

![CTO Email Screen](image)

**Figure 3-18: CTO E-mail Screen**

The CTO E-mail screen is described below:

**Traveler Preferences.** This link opens a screen which displays contact information and form of payment information may be viewed for each traveler in the group authorization.

**Email Status.** No action is needed in this section. The Email Status radio buttons default to a selection based on the status of the document. If the email has already been sent, the date when it was sent displays next to name of the type of email. Listed below are the types of emails that can be sent to the CTO referencing reservations for the group of travelers:

- **Last Request Email.** This email submits the group travel information to the CTO. It includes the arrangements requested (i.e., air, car rental, lodging); total number of travelers; name of each traveler; and the point of contact (POC) name and information.
- **Approval Email Sent.** Once the AO approves the group authorization, DTS sends an approval email to the CTO giving permission to ticket the reservations. The CTO sends an email to the POC with information about the booked reservations and costs.
• **Cancel Email Sent.** This button is only available after the first Request email has been sent. When selected, the process will change the Send Request button to a Cancel Email button. If an AO sends the cancellation email, DTS sends a copy of the email to the POC. Likewise, if the email is sent by either the primary traveler or NDEA, the AO receives a copy.

The information in the Point of Contact section defaults to the user who created the document.

2. Enter the **Name**, **Phone**, and **Email address** of the POC whom the CTO may contact, if different from the information displayed.

3. Complete the **CTO Group ID** field if the CTO has provided a group identifier number.

4. Complete the **Comments** field with information helpful to the CTO when booking the reservations. (For example, “We need to book a van since the group will ride in one vehicle.”) All email types allow the addition of general comments.

**Note:** If the document contains air travel, Secure Flight Passenger Data (SFPD) will be required by the CTO to make reservations. This information includes each traveler's full name, date of birth, gender, and redress number (if applicable). The traveler's full name must match the Government issued identification (driver's license, passport, or military identification).

5. Select **Send Request Email** to send the reservations request to the CTO.

The request email contains a summary of the types of reservations requested in the group authorizations (air, hotel, rental car, or other ticketed transportation). None of these email summaries are editable. Below is a list of information that displays in each summary:

- **Air Travel.** For each air leg; airline name, flight ID, departure airport, departure date and time, arrival airport, arrival date and time, total cost, and comments.
- **Lodging.** For each hotel; hotel name, location, check-in date, check-out date, total cost, and comments.
- **Rail Travel.** For each rail leg, the summary follows the same format as the air travel summary.
- **Rental Car.** For each vehicle; rental company name, car class, pick-up date and time, drop-off date and time, pick-up location, total cost, and comments.
- **Ticketed Transportation.** For each ticketed transportation record in the group authorization; type, description, ticket number, departure date, total cost, and comments.

If the group authorization contains unidentified travelers, a pop-up message informs the user the email will not be sent.

6. Select **Traveler Preferences** near the top of the screen.

The Traveler Preferences screen opens (Figure 3-19). The Traveler Preferences link and screen will not display if either of the following is true:

- There are unidentified travelers in the group authorization (e.g., the user has indicated five people will travel, but only four names are listed).
The CTO email address is not included with the pseudo city code data in the profile.

Figure 3-19: Traveler Preferences Screen

7. Select **Print Travel Preferences** and fax it to the CTO to identify the form of payment for each traveler’s tickets. Close the group authorization without signing until the CTO replies with the actual cost.

**Note:** If the CTO responds with costs that are the same as the preferred reservations, open the document and apply the SIGNED stamp. If there are changes to the costs, update the Group Authorization as explained in Section 3.2.8, before you apply the **SIGNED** stamp.
If the CTO response states that the booked reservations have resulted in a cost that is different from the original request, these new costs must be entered into the group authorization. It is important to make the changes so that expenses can be distributed among the travelers correctly.

**Note:** To attach the CTO’s response to the document by using the Substantiating Records feature, see Chapter 2, of this manual.

### 3.2.9 Update Costs

If costs need to be changed after the AO has approved the group authorization, an amendment is necessary.

The following list illustrates steps to edit the reservation costs in the group authorization. For more information about amendments, see Chapter 7 of this manual.

Access the group authorization. The Preview Trip screen opens (Figure 3-14).

For changes to air or rail reservation costs:

1. Select **Edit** next to the flight or rail reservation on the Preview Trip screen.
2. Select **Change** next to the reservation on the Trip Summary screen.
3. Change the **Ticket Value** field on the Edit Ticketed Information screen.
4. Select **Save**.

For changes to lodging reservation costs:

1. Select **Edit** on the Per Diem Entitlements screen.
2. When the Per Diem Entitlements screen opens, select the dates the lodging costs will affect. In the **Lodging** field enter the total cost for all travelers. Select **Save These Entitlements**.

For changes to rental car reservation costs:

2. Update the cost for an existing rental car expense.
   - **AND/OR-**
     - Add a Commercial Auto-TAD/TDY expense and enter the correct cost.
3. Select **Save Expenses**.

The email responses from the CTO are uploaded or attached to the group authorization and can be viewed using the Substantiating Records screen.

Begin the Review/Sign process.

The final step submits the requests to the CTO. The CTO books the reservations for the entire group and attempts to reserve the requests identified in the group authorization. After booking reservations for the group, the CTO emails the confirmed reservation and cost information to the primary traveler.
Chapter 3: Group Authorizations For Temporary Duty Travel

When the confirmed reservations and cost information are received from the CTO, any adjusted costs must be updated in the group authorization.

3.3 Group Authorization for 10 or More Travelers

Local business rules at the your site may require that the Transportation Officer (TO) arrange transportation reservations for groups of 10 or more, instead of the CTO. In this case, the group authorization should be created by following the below process:

1. The NDEA or primary traveler confirms that the routing list is set up to route the group authorization to the TO if the group exceeds nine travelers. See DTA Manual, Chapter 5, Section 5.6.2.3, Conditional Routing.

2. The group authorization is created, any known expenses are entered, and the document is signed. Reservation information is not entered at this time.

3. DTS routes the group authorization to the TO to enter transportation costs.

4. The costs must be distributed. The TO can distribute the costs, or anyone else on the routing list may do so when reviewing or approving the group authorization.

5. The TO applies the REVIEWED GROUP AUTH stamp.

6. The group authorization continues to route to the each reviewer on the routing list.

7. The AO reviews and approves the group authorization.

If the TO or the AO identifies any issues or problems with the information, they may change the information or stamp the document RETURNED. This action will route the group authorization back to you for correction.

Note: If no conditional routing exists for group authorizations that have 10 or more travelers, the TO can be contacted outside of DTS to obtain reservations and costs for the group's TDY travel. The cost information is entered and the group authorization is completed as explained in Chapter 2, Section 2.6.6 of this manual.
3.4 Traveler Manifest Report

DTS can generate a manifest (list of travelers) for the group. The manifest may be set up to preview and print a list that excludes the names of certain travelers in the group. Selecting the box in the Exclude column allows the user to retain the traveler on the group authorization, but removes the name from the manifest. If the user does not have group access to a traveler in the group authorization, the SSN of the traveler will be masked on the document.

Beginning on the Group Authorizations/Travel Orders screen (Figure 3-20), follow the below steps to run a Traveler Manifest report.

![Figure 3-20: Group Authorizations/Travel Orders Screen](image)

1. In the Sort by Document Name column, select the appropriate group authorization document name. (YOU can only select the document if the AO has previously stamped it **APPROVED**.)

The Group Authorizations/Group Traveler list screen opens.

2. Select **Print Manifest**.

The DTS Traveler Manifest Report screen opens (Figure 3-21).
Chapter 3: Group Authorizations For Temporary Duty Travel

Figure 3-21: Traveler Manifest Report

<table>
<thead>
<tr>
<th>Contact Information:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>West, Eric</td>
</tr>
<tr>
<td>Title/Rank:</td>
<td>ME-05</td>
</tr>
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<tr>
<th>Itinerary:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Location/Start Date:</td>
<td>RES: Warrenton, VA - 06/22/2015</td>
</tr>
<tr>
<td>TDY End Location/TDY End Date:</td>
<td>RES: Warrenton, VA - 06/30/2015</td>
</tr>
<tr>
<td>Trip Type:</td>
<td>AAR-ROUTINE TDY/TAO</td>
</tr>
<tr>
<td>Trip Purpose:</td>
<td>TRAINING ATTENDANCE</td>
</tr>
<tr>
<td>Trip Duration:</td>
<td>8 Days</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Traveler Information:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Helen</td>
</tr>
<tr>
<td>SSN:</td>
<td>###-##-8224</td>
</tr>
<tr>
<td>Gender:</td>
<td>Female</td>
</tr>
<tr>
<td>Organization:</td>
<td>FTMSARNG</td>
</tr>
<tr>
<td>Title/Rank:</td>
<td>MA-05</td>
</tr>
<tr>
<td>Military Branch of Service:</td>
<td>Big Army National Guard</td>
</tr>
<tr>
<td>Service Agency:</td>
<td>United States Army</td>
</tr>
<tr>
<td>Duty Station:</td>
<td>USFPO-AS</td>
</tr>
<tr>
<td>Duty Station Phone Number:</td>
<td>601-313-1500</td>
</tr>
</tbody>
</table>

| Name:                | Eric                  |
| SSN:                 | ###-##-9473           |
| Gender:              | Male                  |
| Organization:        | TTF161ARV             |
| Title/Rank:          | ME-05                |
| Military Branch of Service: | U.S. Air Force |
| Service Agency:      | United States Air Force |
| Duty Station:        | Sky Harbor IAP        |
| Duty Station Phone Number: | 987-654-3210 |

| Name:                | George Washington     |
| SSN:                 | ###-##-8944           |
| Gender:              | Male                  |
| Organization:        | FTCICM                |
| Title/Rank:          | NE-07                |
| Military Branch of Service: | U.S. Army |
| Service Agency:      | Defense Legal Services Agency |
| Duty Station:        |                         |
| Duty Station Phone Number: | 7035551234 |

| Name:                | Eric                  |
| SSN:                 | ###-##-9743           |
| Gender:              | Male                  |
| Organization:        | DTMODCSD              |
| Title/Rank:          | ME-06                |
| Military Branch of Service: | U.S. Marine Corps |
| Service Agency:      | United States Marine Corps |
| Duty Station:        |                         |
| Duty Station Phone Number: | 703-555-1212 |
The report displays the below information:

- Title and Document Name
- Report Run Date
- Contact Information (taken from the profile of the primary traveler):
  - Name
  - Title / Rank
  - Organization
  - Military Branch of Service
  - Service/Agency
  - Duty Station
  - Duty Station Phone Number

- Itinerary:
  - Start Location/Start Date
  - End Location/End Date
  - Trip Type
  - Trip Purpose
  - Trip Duration

- Traveler Information:
  - SSN (first five digits masked)
  - Gender
  - Organization
  - Title/Rank
  - Military Branch of Service
  - Service/Agency
  - Duty Station
  - Duty Station Phone Number

### 3.5 Amend a Group Authorization

When the AO approves the group authorization, individual authorizations spawn, each with its own travel authorization number. DTS spawns one view-only individual authorization for each traveler in the group. Travelers can view their own individual authorizations in DTS, but you (or NDEA) can amend the group authorization. Once approved, amendments to the group authorization update all of the individual authorizations. This can occur until the group authorization is locked.

When you lock the group authorization DTS allows no more amendments to the document. The travelers can edit their own individual authorizations. If no amendments are necessary, the traveler may create and submit the voucher from the authorization after the trip is completed.

**Note:** The DTS Travel module can never be used to amend reservations on a group authorization. If a reservation needs to be changed, use methods outside of DTS (e.g., telephone, e-mail, or fax) to contact the CTO or TO to have the changes made to the reservations.
3.5.1 Amends the Group Authorization

You may make any number of amendments to a group authorization before locking it. It is important to make any changes that affect all travelers in the group before locking the group authorization. If the group authorization is locked and an amendment becomes necessary, the change must be made in each individual’s authorization.

Once approved, the following amendments to the group authorization are prohibited:

- Changing the routing list
- Adding travelers

Beginning on the Group Authorizations/Travel Orders screen, follow the below steps to amend the group authorization:

1. Select the **amend** link.

The Create Amendment screen opens (Figure 3-22).

![Create Amendment Screen](image)

2. (Optional) Complete the **Comments** box with a justification for the amendment.

3. Select **OK**.

The Digital Signature Login window appears.

4. Complete the **PIN** field.

5. Select **OK**.
The Preview Trip screen opens (Figure 3-23).

![Preview Trip Screen](image)

Figure 3-23: Preview Trip Screen

6. Select **Edit** where it appears next to the flight, rental car, or lodging item to be changed.

The Itinerary section of the group authorization opens to the Per Diem Locations section. It displays the Trip Summary on the right side of the screen, which shows links for removing items from the group authorization.
7. Select **Remove** to remove an item from the group authorization.

8. Enter the CTO-provided cost information on the appropriate DTS screens.

**Note:** Any changes to the itinerary and reservations should be communicated to all travelers included on the group authorization.

9. Once changes are complete, access the Digital Signature screen (Figure 3-17).

10. Select the **Submit Completed Document as** drop-down list arrow and select **SIGNED**.

This process reinitiates routing for approval.

### 3.5.2 Traveler Amends Individual Authorization

When the AO approves the group authorization, an individual authorization is generated for each traveler. Once the group authorization is locked, an amend link displays in the amend column to the right of the document (Figure 3-24).

![Figure 3-24: Authorizations/Orders Screen](image)

Beginning on the User Welcome screen (Figure 3-2), follow the below steps to amend the individual authorization generated from a group authorization.

1. Mouse over **Official Travel** on the menu bar.
2. Select **Authorizations/Orders** from the drop-down list.

   The Authorizations/Orders screen opens.

3. Select **amend** to the right of the document name.

   The Create Amendment screen opens (Figure 3-25).

   ![](image)

   Figure 3-25: Create Amendment Screen

4. (Optional) Enter a reason for the amendment.

5. Select **OK**.

6. The Digital Signature Login window appears.

7. Complete the **PIN** field.

8. Select **OK**.

   The Preview Trip screen opens (Figure 3-23).

9. Use the navigation bar to access the screens and make changes.

10. Apply the **SIGNED** stamp to reinitiate routing for approval.
3.5.3 Primary Traveler Amends an Individual Authorization

When the group authorization is locked, it is no longer amendable. Only the individual authorizations can be amended. You may make amendments to the individual authorizations that were generated from the group authorization. The document name became a link when the group authorization was approved.

Group Locked displays to the right of the locked group authorization in the Group Authorizations/Travel Orders screen (Figure 3-26). Beginning on the Group Authorizations/Travel Orders screen, follow the below steps to amend an authorization:

1. Select the **group authorization** link in the Sort by Document Name column.

![Figure 3-26: Group Authorizations/Travel Orders Screen](image)

The Group Authorizations/Group Traveler List screen opens.

If you do not have group access to a traveler in the group authorization, the view/edit, amend, and print links will not be available. See Table 3-2 for a description of the columns.
Table 3-2: Group Authorization/Group Traveler List Screen Description

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exclude</td>
<td>Column contains boxes used to exclude the traveler’s name from the Traveler Manifest. Does not remove a traveler from a group authorization.</td>
</tr>
<tr>
<td>Traveler</td>
<td>The names of the travelers included on the group authorization.</td>
</tr>
<tr>
<td>Document Name</td>
<td>Column header for the names of the group authorization or the generated authorizations.</td>
</tr>
<tr>
<td>Status</td>
<td>Column header for the name of the last stamp that was applied to each document.</td>
</tr>
<tr>
<td>TA Number</td>
<td>Column header for the travel authorization number for each traveler’s document.</td>
</tr>
<tr>
<td>View/Edit</td>
<td>Column contains one of two links used to open the document. If view displays, the user may only view the individual authorizations. If edit displays, the user may edit the document if it has been signed by the traveler.</td>
</tr>
<tr>
<td>Print</td>
<td>Column contains the link used to print a copy of the traveler’s individual authorization.</td>
</tr>
<tr>
<td>Release</td>
<td>Column contains the link that allows the AO to remove a traveler from a group authorization once it is locked.</td>
</tr>
<tr>
<td>Amend</td>
<td>Column contains the link used to initiate changes to the individual authorizations after the document has been stamped APPROVED.</td>
</tr>
<tr>
<td>VCH</td>
<td>Identifies whether or not a voucher has been created for an authorization. The letter “Y” displays if a voucher has been created.</td>
</tr>
<tr>
<td>Return to Doc List</td>
<td>Button used to return to the Group Authorization / Travel Orders screen.</td>
</tr>
<tr>
<td>Print Manifest</td>
<td>Button used to display the Traveler Manifest Report (Section 3.4).</td>
</tr>
</tbody>
</table>

1. Select **amend** to the right of the corresponding traveler’s document to create an amendment.

   The Create Amendment screen opens (Figure 3-25).

2. (Optional) Enter a reason for the amendment.

3. Select **OK**.

   The Digital Signature Login window appears.

4. Complete the **PIN** field

5. Select **OK**.

   The Preview Trip screen displays (Figure 3-14).

6. Make all necessary edits to the authorization.
7. Apply the SIGNED stamp to reinitiate routing for approval.

3.5.4 Remove or Release a Traveler from a Group Authorization

Before AO approval, a traveler may be removed from a group authorization. Access the Group Authorizations/Group Traveler List screen.

1. Select remove to the right of traveler’s name.

A message displays requiring a confirmation that a traveler is to be removed from the group authorization.

2. Select OK.

After AO approval, a traveler must be released from the group authorization. Once released, DTS disassociates the traveler from the group authorization and automatically makes the traveler’s individual authorization available for editing. When DTS disassociates a traveler’s individual authorization, it is no longer updated by amendments made to the group authorization and obligations are no longer submitted. Once the individual authorization is available for editing, the traveler can amend, create a voucher, or cancel the individual authorization as needed.

Beginning on the Group Authorizations/Travel Orders screen, follow the below steps to release a traveler from the group authorization.

1. Select the document name link for the group authorization from which the traveler is to be released.

The Group Authorizations/Group Traveler List screen opens.

2. Select Release to the right of the name to be removed from the group authorization.

Once selected, the word Released displays in the Release column. This is not a link.

Once a traveler is released, DTS sends an email to the traveler. The email informs the traveler their document has been released from the group authorization. The email also states that if changes are required, the traveler must amend the individual authorization.

3.5.5 Lock the Group Authorization

Once the AO has approved all amendments, you may lock the group authorization. This action makes the individual authorizations editable. The travelers may amend their own individual authorizations and create vouchers.

If you did not lock the group authorization, DTS will automatically lock it three days after the trip end date. This automatic lock date is scheduled to occur after the trip end date in case it is necessary to amend the entire group authorization after the trip. This reduces the likelihood that each traveler will have to make individual amendments.

However, if the group authorization includes requests for SPPs, the group authorization must be locked in a timely manner. This allows each traveler to amend their individual authorization and request SPPs.

Beginning on the Group Authorizations/Orders screen, follow the below steps to lock the group authorization:
1. Select Lock Group to the right of the corresponding document name (Figure 3-27).

![Figure 3-27: Group Authorizations/Travel Orders Screen](image)

A pop-up message appears informing the user that the document will be locked and cannot be amended further.

2. Select OK.

The Lock Group link changes to Group Locked and is no longer a link.

3.6 Cancel a Group Authorization

Until the group authorization is locked, you may create an amendment to cancel it.

When the AO applies the CANCELLED stamp to the group authorization, DTS cancels the individual authorizations automatically.

If the trip is cancelled after the group authorization has been locked, each of the travelers' individual authorizations will have to be cancelled one at a time. Use the Trip Cancel link as described in Chapter 10 of this manual.

CTO-disabled sites should refer to their local business rules to cancel any reservations.

**Note:** If the group authorization contains a CTO fee, the CANCELLED stamp will not be available for the AO to select. A voucher must be created to receive reimbursement for any incurred expenses or SPPs that were submitted or paid.
3.6.1 Cancel a Group Authorization That Has Not Been Locked

Beginning on the Group Authorizations/Travel Orders screen, follow the below steps to cancel a group authorization that has not been locked.

If the group authorization has not been approved, follow the steps below. If the group authorization has been approved, follow Steps 1 through 4 in Section 3.5.1, then proceed to Step 6, 9, or 13 in this section as appropriate.

1. Select **view/edit** next to the document to be cancelled.

The View-Only prompt opens.

2. Clear the **Open Document VIEW-ONLY** box.

3. Select **OK**.

The Digital Signature Login window appears.

4. Complete the **PIN** field.

5. Select **OK**.

The Preview Trip screen opens (Figure 3-14).

If reservations were made, proceed to the next step. If no reservations were made but expenses were incurred or added to the group authorization, proceed to Step 9. If no reservations were made and expenses were not added to the group authorization or incurred, proceed to Step 13.

6. Select **Travel** on the navigation bar.

The Trip Summary screen opens.

7. Select **Cancel** for each reservation that displays on the screen. Select **OK** on each cancellation confirmation pop-up window.

**Important:** A hotel cancellation confirmation number must be obtained to ensure that a no-show charge is not incurred. If the CTO does not provide a hotel cancellation confirmation number, it becomes the traveler's responsibility to contact the hotel directly to obtain one.

If the authorization contains information for tickets booked outside of DTS, select **Add New Ticketed Transportation** (in the bottom right hand corner of the screen), or select **Other Transportation** on the subnavigation bar. When the Other Trans. screen opens, select **Remove** in the Trip Summary on the right side of the screen. Select **Summary** on the subnavigation bar to return to the Trip Summary screen.

8. Select **Save and Continue**.

If expenses were incurred or added to the group authorization, proceed to the next step, if no expenses were incurred or added to the group authorization, proceed to Step 13.

9. Select **Expenses** on the navigation bar.
The Non-Mileage Expenses screen opens. The Expenses Summary displays the expenses on the right side of the screen.

10. Select **Remove** for each expense that was not incurred. Only retain expenses that need to be reimbursed (e.g., a paid fee).

11. Select **Mileage** on the subnavigation bar and remove any mileage expenses that have not been incurred.

12. Select **OK**.

13. Select **Itinerary** on the navigation bar.

The Trip Overview screen opens.

14. Select **Edit** in the Location 1 box.

The Per Diem Locations screen opens.

15. Select the **Departing On** calendar and select the same date displayed in the **Arriving On** field.

**Note:** Do not use the **Remove** link during the cancellation process. The per diem entitlements are cancelled when the Arriving On and Departing On dates become the same.

16. Select **Save Changes**.

17. Select **OK**.

The Trip Overview screen refreshes.

18. Select **Edit** in the Overall Ending Point box.

19. Select the **End Date** calendar and select the same date displayed in the **Start Date** field.

20. Select the **12 Hours or Less** radio button under Trip Duration. This ensures that no per diem allowances are paid to the travelers.

21. Select **Proceed to Per Diem Locations**.

A pop-up message displays to inform the user that the per diem entitlements have been updated to reflect the changes in the date.

22. Select **OK**.

The Per Diem Locations screen refreshes.

23. Select **Expenses** on the navigation bar.

24. Select **Per Diem Entitlements** on the subnavigation bar.

The Per Diem Entitlements screen opens. Confirm that lodging and M&IE are equal to zero.

Chapter 3: Group Authorizations For Temporary Duty Travel

The Preview Trip screen opens (Figure 3-14).

If the group authorization included SPPs, scroll down and select the Edit link next to Scheduled Partial Payments. Select Cancel Scheduled Partial Payments, and select Continue to return to the Preview Trip screen.

26. Complete the Comments to Approving Official field with the appropriate cancellation and expense information:

- If there were no expenses, then enter: Trip was cancelled - no expenses incurred.
- OR-
- If there were expenses, then enter: Trip was cancelled - expenses were incurred.

27. Scroll down the Accounting Summary and verify that the Calculated Trip Cost is equal to the cost of expenses incurred.

28. Select Save and Proceed to Other Auths at the bottom of the screen.

The Other Authorizations screen opens (Figure 3-15).

29. Select Pre-Audit on the subnavigation bar.

The Pre-Audit Trip screen opens (Figure 3-16).

30. Ensure that all preaudit flags are justified.

31. Select Save and Proceed to Digital Signature.

The Digital Signature screen opens (Figure 3-17).

32. Select the *Submit this Document as drop-down list and select SIGNED.

33. Select Submit Completed Document.

The Digital Signature Login window appears.

34. Complete the PIN field.

35. Select OK.

If no expenses were incurred, DTS sends an email to the traveler when the AO stamps the document CANCELLED.

If expenses were incurred, a voucher must be created to receive reimbursement after receiving email notification that the AO approved the group authorization.