APPENDIX A: General Traveler Information

This appendix provides guidance on using the Self-Registration Tool and the Traveler Setup menu.

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A.1 How to Self-Register

An individual who has not been entered in DTS may need to self-register when they first log in to the system. Follow the below steps to self-register in DTS:

1. Insert the CAC into the CAC reader.
2. Select the green Login to DTS button that is located near the center of the DTS Home page.
   The DoD Privacy and Ethics Policy statement displays.
3. Read the policy and select Accept.
4. Enter the PIN in the PIN field.
5. Select OK.

The User Activation screen opens (Figure A-1).

6. Enter the Social Security Number (SSN) in the Enter Social Security Number field.

Figure A-1: User Activation Screen
7. Re-enter the SSN in the **Re-enter Social Security Number** field.

8. Place a check in the **Reserve/National Guard** box, if you are in the Reserve or National Guard and want to register your Reserve Component profile.

9. Select **Submit**.

The User Activation screen refreshes (Figure A-2).

10. Select **Self Register**.

The DTS Welcome screen opens.
11. Mouse over the **Administrative** tab and select **Self Registration** (Figure A-3).

![Figure A-3: User Welcome Screen](image-url)
The Self Registration Tool screen opens (Figure A-4).

![Figure A-4: Self Registration Tool Screen](image)

12. Select **Basic Information** on the navigation bar.
The Basic Information screen opens (Figure A-5).

13. Complete the fields on the screen.

**Note:** The CSA/TTR feature is currently not in use.
**Important:** Ensure your enter the correct organization in the Organization field. Failure to enter the correct organization will route the self-registration request to the wrong DTA.

14. Select **SAVE AND PROCEED**.

The Additional Information screen opens (Figure A-6).

![Self-Registration Additional Information Screen](image)

Figure A-6: Self-Registration Additional Information Screen

15. Complete the fields on the screen.

16. Select **SAVE AND PROCEED**.

The Submit Self-Registration screen opens (Figure A-7).

![Submit Self-Registration Screen](image)

Figure A-7: Submit Self-Registration Screen
17. Select **SUBMIT**.

DTS sends an email to the DTA to inform them of the self-registration request. After the DTA reviews the self-registration, you will receive an email to inform you if the DTA accepted or rejected your request. If a request is rejected, you must correct the information and resubmit the request.

**A.2 Traveler Setup Menu**

The Traveler Setup menu provides access to the below functions:

- Form Preferences
- Available Routing Lists
- Delegate Authority
- User Preferences
- Rates Lookup
- Update Personal Profile

Beginning on the DTS User Welcome screen, mouse over **Traveler Setup** on the menu bar (Figure A-8).

---

**A.2.1 Form Preferences**

The Form Preferences screen allows you to change form defaults for your printed documents.

Follow the below steps to update form defaults for printed documents:

1. Select **Form Preferences** from the Traveler Setup drop-down list.

---

Figure A-8: Traveler Setup Menu Screen
The Form Defaults screen opens (Figure A-9). Table A-1 describes the options that display in each section.

![Form Defaults Screen](image)

Figure A-9: Form Defaults Screen

2. Select the **radio button** or **check box** next to the options for each document type or attachment to set the preferred form default.

3. Select **Save Form Defaults**.
See Table A-1 for a description of each form default. The Authorizations/Orders section and the Vouchers section display some of the same options; however, Table A-1 shows those items only once under the collective row heading Authorizations/Orders and Vouchers section.

Table A-1: Form Default Screen Options

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AUTHORIZATIONS/ORDERS AND VOUCHERS</strong></td>
<td></td>
</tr>
<tr>
<td>Print Full SSN*</td>
<td>Select No to mask the first 5 digits of the SSN (XXX-XX-6789). Select Yes to display the full SSN (123-45-6789). Default setting is No.</td>
</tr>
<tr>
<td>Default</td>
<td>Provides more details than the Govt forms provide. Prints all travel data in plain text.</td>
</tr>
<tr>
<td>Govt + Form</td>
<td>Prints trip information using the DD1610 format. Populates all appropriate fields with information from the travel document.</td>
</tr>
<tr>
<td>Govt</td>
<td>Prints trip information using the DD1610 format. Printing with this option requires a blank DD1610 to be inserted into the printer.</td>
</tr>
<tr>
<td><strong>AUTHORIZATIONS/ORDERS</strong></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>Turns off printing of a cash advance.</td>
</tr>
<tr>
<td>Summary</td>
<td>Prints the group authorization and a cash advance summary of the total advance amount for all travelers combined.</td>
</tr>
<tr>
<td>Summary + Individual</td>
<td>Prints the group authorization, a cash advance summary of the total advance amount for all travelers combined, and a separate authorization and cash advance for each traveler in the group authorization.</td>
</tr>
<tr>
<td>Itinerary Listing</td>
<td>Prints itinerary information for reservations.</td>
</tr>
<tr>
<td><strong>VOUCHERS</strong></td>
<td></td>
</tr>
<tr>
<td>Receipt Checklist</td>
<td>Prints a list of receipts that are attached to the voucher.</td>
</tr>
<tr>
<td><strong>ATTACHMENTS</strong></td>
<td></td>
</tr>
<tr>
<td>Document History</td>
<td>Prints the electronic history of a document and shows each step in the electronic approval and/or processing of the document.</td>
</tr>
<tr>
<td>Accounting Detail</td>
<td>Prints the subtotals of a document's expenses by accounting code and expense category.</td>
</tr>
<tr>
<td>Privacy Act</td>
<td>Prints the Privacy Act Statement.</td>
</tr>
<tr>
<td><strong>PRINT DOCUMENT NAME</strong></td>
<td></td>
</tr>
<tr>
<td>Block 2 of SF1164</td>
<td>Not used in DTS.</td>
</tr>
<tr>
<td>Block 22 of DD1610</td>
<td>Prints the document name on block 22 of form DD1610.</td>
</tr>
</tbody>
</table>

*When a user with permission level 5 prints a DTS document for a traveler, DTS will apply the permission level 5 user's form preference settings for the Print Full SSN option. If the user does not have permission level 5, they cannot print the traveler's full SSN. In this case, the SSN is always masked.
A.2.2 Available Routing Lists

The Available Routing Lists screen displays all routing lists that belong to the user's organization. The screen also displays the routing elements for each routing list.

Follow the below steps to view available routing lists:

1. Select **Available Routing Lists** from the Traveler Setup drop-down list (Figure A-8).

The Routing List screen opens (Figure A-10).

2. Select the **Organization** drop-down list and choose the organization.

![Figure A-10: Routing List Screen](image-url)
3. Select **view** next to the routing list to be viewed (Figure A-11).

![Routing List Screen - View Routing List](image-url)
The screen refreshes. The Signatures section displays the routing elements that are assigned to the routing list (Figure A-12).

![Routing List Screen - Signatures](image)

**Figure A-12: Routing List Screen - Signatures**

### A.2.3 Delegate Authority

The Delegate Authority screen allows Routing Officials to delegate their authority to other Routing Officials within their organization. When Delegate Authority is selected, the screen will display a list of officials who have permission level 2 and can perform the Routing Official role in DTS. Signature authority can be delegated to one person at a time.

Follow the below steps to delegate authority:

1. **Select Delegate Authority** from the Traveler Setup drop-down list (Figure A-8).
The Delegate Authority screen opens (Figure A-13).

2. Choose **Select** next to the name of the Routing Official to receive delegated authority. The screen refreshes. The Assign Authority section displays (Figure A-14).

3. Select **OK**. The Digital Signature screen opens.

4. Enter the PIN in the **PIN** field.

5. Select **OK**.
When authority has been delegated, the below events occur:

- The delegated official's name displays in the travel documents Pending Routing Actions list.
- Documents that route to the Routing Official will now route to both individuals.
- Emails sent to the Routing Official will now be sent to both individuals.
- DTS removes documents from both individuals' Route & Review screens after the documents are stamped.

Follow the below steps to remove signature authority:

1. Select **Delegate Authority** from the Traveler Setup drop-down list (Figure A-8).

The Delegate Authority screen opens (Figure A-15).

2. Select **Remove** next to the name of the Routing Official whose authority is to be removed.

A window opens for the user to confirm revocation of the delegated signature authority.

3. Select **OK**.

For more information on delegating authority, see *DTA Manual, Chapter 5*.
A.2.4 User Preferences

Whenever a document is accessed, DTS records the time of the occurrence. DTS displays the time of access in places such as the travel arrangements screens, Document History, and the DTA Maintenance Tool. The User Preferences screen allows the user to set the time format displayed in DTS as either 12-hour or 24-hour.

Follow the below steps to set a format displaying time in DTS:

1. Select **User Preferences** from the Traveler Setup drop-down list (Figure A-8).

The User Preferences screen opens (Figure A-16). The time format section offers two options: AM/PM displays time using a 12-hour clock, with AM or PM as appropriate; 24 Hour displays the time in the 24-hour format.

   ![User Preferences Screen](image)

   Figure A-16: User Preferences Screen

2. Select the radio button next to the preferred time format, **AM/PM** or **24 Hour**.

3. Select **Save Preferences**.

Email Routing Notification is not functional at this time.
A.2.5 Rate Lookup

The Rate Lookup Menu screen links you to information about per diem rates for locations, the states and countries that have per diem rates loaded in DTS, mileage reimbursement rates, and the Government meal rate (Figure A-17). You may also view a list of special footnotes published by the Per Diem Travel and Transportation Allowance Committee (PDTATAC) staff.

Figure A-17: Rate Lookup Menu Screen

To access the options available on the Rate Lookup Menu screen, begin by selecting Rates Lookup from the Traveler Setup drop-down list (Figure A-8). The Rate Lookup Menu screen opens (Figure A-17).
A.2.5.1 Find Per Diem Rates

Beginning on the Rate Lookup Menu screen (Figure A-17), follow the below steps to find per diem rates for TDY locations:

1. Select **Per Diem Locations**.

The Per Diem Rates screen opens (Figure A-18).

2. Select the radio button to specify **All Time Periods**, **Effective Now**, or **Specific Period**.

If you selected **Specific Period**, use the calendar icons in the **From** and **To** fields to identify the date range.

3. Select the radio button to specify **United States**, **Foreign**, or **All** and select the **State/Country** drop-down list to choose the state or country.
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-OR-
Complete the **5 Digit Zip Code** field with the ZIP code.
-OR-
Select the **State** and **County** drop-down list to choose the state and county.

4. Select **Search**.

The Per Diem Rates screen refreshes. A list of locations that match the search displays at the bottom of the screen.

5. Select the **Show Rates** link for the TDY location.

The Rates screen opens (Figure A-19).

![Figure A-19: Rates Screen](image)

**A.2.5.2 View Per Diem Locations**

Beginning on the Rate Lookup Menu screen (Figure A-17), follow the below steps to see a list of locations that have per diem rates in DTS:

1. Select **States and Countries**.
The States and Countries screen displays (Figure A-20). The locations are listed in alphabetical order. The Code column identifies the abbreviation code for each location.

A.2.5.3 Mileage Rates

Beginning on the Rate Lookup Menu screen (Figure A-17), follow the below steps to view rates used to calculate reimbursement when using a privately owned vehicle (i.e., automobile, motorcycle, plane).

1. Select **Mileage Rates**.
The Mileage Reimbursement screen opens (Figure A-21). Rates are listed by type and then sorted according to the effective date of the mileage rate.

![Mileage Reimbursement Screen](image)

**Figure A-21: Mileage Reimbursement Screen**

### A.2.5.4 Government Meal Rates

Beginning on the Rate Lookup Menu screen (Figure A-17), follow the below steps to view how daily rates are broken down into meals and incidental allowances.

1. Select **Government Meal Rate**.
The M&IE Distributions screen opens (Figure A-22). Rates are listed by effective date.

![Figure A-22: M&IE Distributions Screen](image)

**A.2.5.5 Footnotes**

Beginning on the Rate Lookup Menu screen (Figure A-17), follow the below steps to view any footnotes published by the PDTATAC staff.

1. Select **Footnotes**.

The Footnotes screen opens.
A.2.6 Update Personal Profile

The Update Personal Profile is a five-screen feature that allows persons with a user/traveler profile to update their personal information. Figure A-23 shows an overview of the profile information on each screen of this feature.

Figure A-23: Overview of Update Personal Profile Screens

Note: Changes made using this feature will not update the profile information in existing documents. To update personal profile information in existing documents, see Chapter 2 of the Document Processing Manual.

Follow the below steps to update personal profile information:

1. Select Update Personal Profile from the Traveler Setup drop-down list (Figure A-8).

The Update Personal Profile screen opens (Figure A-24). The profile has five parts. Each part displays on a different screen that may be accessed and updated through the following links:

- My Profile (This screen opens by default; a link to the open screen will not display.)
- My Preferences
- My Additional Information
- My Account Information
- My TSA Information
2. Select the link to the screen that needs to be updated:
3. Enter or update data.
4. Select **Update Personal Information**.
Appendix A: General Traveler Information

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