# Table of Contents

1 **GROUP AUTHORIZATIONS**  
   1.1 Group Authorization Process Overview  

2 **CREATE A GROUP AUTHORIZATION**  
   2.1 Create Itinerary  
   2.2 Select Travelers  
   2.3 Travel Module > Air Reservations  
   2.4 Travel Module > All Other Reservation Types  
   2.5 Expenses Module > Mileage & Non-Mileage Expenses  
   2.6 Additional Options Module > Group Travelers  
   2.7 Additional Options Module > Partial Payments  
   2.8 Additional Options > Advances  
   2.9 Review / Sign Module > Distributions  
   2.10 Review / Sign Module > Digital Signature  

3 **UNIQUE GROUP AUTHORIZATION TOOLS**  
   3.1 Print a Traveler Manifest  
   3.2 Remove or Release a Traveler from a Group  
   3.3 Lock a Group Authorization  
   3.4 Amend a Group Authorization  
   3.5 Amend an Individual Authorization  
   3.6 Cancel a Group Authorization  

4 **HELPFUL RESOURCES**
### Revision History

<table>
<thead>
<tr>
<th>Revision No.</th>
<th>Date</th>
<th>Authorization</th>
<th>Revision/Change Description</th>
<th>Page, Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>08/11/2017</td>
<td>Defense Travel Management Office (DTMO)</td>
<td>New Guide</td>
<td>All</td>
</tr>
<tr>
<td>1.1</td>
<td>08/21/2017</td>
<td>DTMO</td>
<td>Matched format with other DTS Guides</td>
<td>All</td>
</tr>
<tr>
<td>2.0</td>
<td>2/16/2018</td>
<td>DMTO</td>
<td>Updated formatting and screenshots</td>
<td>Throughout</td>
</tr>
<tr>
<td>3.0</td>
<td>8/17/2018</td>
<td>DTMO</td>
<td>Updated to show full process</td>
<td>Throughout</td>
</tr>
</tbody>
</table>
1 Group Authorizations

To save time when two or more people travel together to the same TDY location, you can create a single document, a group authorization, to capture travel details common to all group travelers. Later, DTS splits the group authorization into individual authorizations, which each traveler can edit to enter details unique to their own trip. After travel, each traveler creates and submits a voucher to claim reimbursement for the expenses they incurred and payment for the allowances they earned.

To create a group authorization, you must have group access to all travelers in the group. The person who creates a group authorization in DTS is known as the Primary Traveler if they will travel with the group, although a travel clerk or Non-DTS Entry Agent (NDEA) can also create a group authorization. In this Guide, “you” are assumed to be the Primary Traveler, travel clerk, or NDEA.

1.1 Group Authorization Process Overview

Your local business rules determine some of the specifics, but the general group authorization process is:

1. You create the document by entering the itinerary, reservation requests, expenses and allowances, etc. in much the same way you would create any authorization. However, with a group authorization, you must also:

   a. Identify the group travelers.

   b. Email the reservation requests to the Travel Management Company (TMC, which DTS calls the Commercial Travel Office [CTO]).

      Note: Your local business rules may require a Transportation Officer (TO) to make transportation arrangements for groups of 10 or more travelers.

   c. Enter the transportation costs you receive from the TMC or TO.

   d. Distribute all shared expense costs between the group’s travelers.

3. After you sign the group authorization, DTS routes it to the Authorizing Official (AO) for approval. After the AO approves it, DTS creates a copy of the group authorization (known as an individual authorization) for each traveler. Individual authorizations are view-only for the travelers at this point.
4. Should you need to amend the group authorization, when the AO approves the amendment, DTS reflects all changes in the individual authorizations (which are still view only at this point).

5. When the group authorization is locked (either by you or DTS – see Section 3.3), DS makes the individual authorizations editable, so travelers can update their own authorizations and create vouchers. After locking, the group authorization is permanently non-editable.

You can see this process visually in Figure 5-1.
2 Create a Group Authorization

If you’ve been with DTS for a while, it may be easiest to think of creating a group authorization as following the old DTS process, as the authorization screens have not yet changed to the new layout. However, for those who are new to DTS, this manual shows the entire process.

2.1 Create Itinerary

To create a group authorization, beginning on the DTS Dashboard (Figure 5-2), select Create New Document, then Group Authorization. The Group Authorizations screen (Figure 5-3) opens.

Figure 5-2: DTS User Welcome Screen
Complete the authorization by entering the following information:

1. **Section A:** The starting point, trip start date, trip type, trip reason, and (optional) trip description

2. **Section B:** The transportation mode the group will use to get to the first TDY location and the time that transportation will leave.

3. **Section C:** The first TDY location, and the dates the group will arrive there and depart from there.

4. **Section D:** Check the box if the group needs at least one rental car.
5. **Section E:** Whether there are additional TDY locations.
   - If “Yes”, repeat steps 2-5 for each additional TDY location.
   - If “No”, the screen refreshes to show new sections B-F (Figure 5-4). Proceed to step 6.

   ![My TDY location is -](Image)

   ![I am returning to:](Image)

   ![I will be returning from my TDY by](Image)

   ![Check this box if you have other ticketed transportation not listed above:](Image)

   ![Conference/Event Name](Image)

   ![CTO Full Assistance Request](Image)

   ![Save and Proceed](Image)

   **Figure 5-4: Trip Overview Screen – Screen 2**

6. **Section B:** Updated information for TDY locations and dates, if necessary.

7. **Section C:** The trip ending point, trip end date, and trip duration.

8. **Section D:** The transportation mode the group will use to return from the last TDY location and the time that transportation will leave.

9. **Section E:** Check the box if the group will use ticketed transportation purchased outside DTS.

10. **Section F:** If attending a conference, enter the name. If not, select **Not Applicable**.

11. Select **Save and Proceed**. Go to section 2.2.
2.2 Select Travelers

When you save the itinerary, the Group Travel Selection screen (Figure 5-5) opens. This screen lets you select group travelers, provided they are members of a group to which a Defense Travel Administrator (DTA) has granted you group access. For more information on how groups and group access work, see the [DTA Manual, Chapter 6](https://www.defensetravel.dod.mil).

![Figure 5-5: Group Travel Selection Screen](https://www.defensetravel.dod.mil)

The left column offers three different ways to search for travelers to add to the group. You can search by:

- **Social Security number (SSN)**
- **Last Name** (all or part) with the option to include all or part of a **First Name**
- **Travel Team**: Select a list of people. Travel Teams are a handy way to select a number of people who frequently travel together.
Select the travelers from the search results that appear below the search tools.

The right column provides the tools and information for you to:

- Choose a **Routing List**.

- Identify the total number of travelers (**Total Traveler(s)**) – who will be in the group. DTS uses this number and the travelers you have identified to calculate the number of travelers you have not yet added (**Unidentified Traveler(s)**).

- (Optional) Enter a **Travel Team** name if you want to save the currently identified travelers as a new Travel Team.

- Identify the travelers in the group. The **Primary** column identifies the Primary Traveler and lets you designate a different Primary Traveler. All travelers except the Primary Traveler have a remove link to delete them from the group authorization.

- **Save a Travel Team.**

- **Proceed** to the reservations process when you are finished on this screen.

**Notes:**

1) You do not have to identify all travelers by name before you proceed, though you must identify them all before the AO may approve the group authorization.

2) When you hit **Proceed**, a profile review screen triggers for all travelers who have not used DTS in the past 60 days or have an expired (or soon to be expired) Government Travel Charge Card (GTCC) in their DTS profile. Review the information for accuracy and work with the group members to update their DTS profiles as necessary.
2.3 Travel Module > Air Reservations

When requesting air reservations, keep the following rules in mind:

- Your local business rules may require a Transportation Officer (TO) to make transportation arrangements if your group contains 10 or more travelers. If so, skip the entire transportation reservations process. Your TO will make transportation arrangements and give you the costs.

- Your organization may have a routing list that includes a TO review. If so, select that routing list before you sign the group authorization. For more about routing lists, see *DTA Manual, Chapter 5*.

- When you select reservations, you’re actually only identifying flight preferences for the TMC, though the TMC may have to select a different flight to get seats for all travelers, so be aware that your flight requests may change.

- The cost you will ultimately enter into DTS is the total estimated cost for all travelers, not the cost per traveler. Example: The group contains five travelers. The TMC returns a flight cost of $2,500. The tickets therefore cost $500 per traveler.

  **Note:** This difference applies to all reservations, not just air reservations.

- You won’t select seats or enter Secure Flight Passenger Data traveler information.

With that in mind, you can start looking at flights (Figure 5-6). Use the **Modify Search** area on the left to find alternate flights if those presented automatically do not suit your needs.

Rather than selecting a flight, use the TMC assistance request button at the bottom of the screen to create and send an email to the TMC to help you get the reservations you need. After the TMC gets back to you with the total costs, you’ll enter them into DTS. For now, just continue finding reservations.

When you finish selecting the flights, DTS moves on to the other reservation types you identified when you created the itinerary.
2.4 Travel Module > All Other Reservation Types

All other reservation types (train, rental car, hotel) follow a similar processes. Again, do not actually select the reservations. Instead, use the TMC assistance button to have the TMC do it for you. The TMC will return the collective costs of the reservations. Example: The group contains five travelers who need lodging for 10 nights each. The TMC returns a total lodging cost of $10,000. The hotel therefore costs $200 per traveler per night.

There is one exception to the “let the TMC do it” rule. If you only need one rental car, go ahead and book that yourself in DTS. For all other reservations, let the TMC do the heavy lifting.

2.5 Expenses Module

Enter all reimbursable expenses and travel allowances that you are aware of just like you do for any other authorization (see DTS Guide 2: Authorizations for more information). In addition, once you get the total reservation costs back from the TMC, you must enter the total air, rail, and lodging costs in the Other Expenses area.
For all expense items, be sure to enter the total cost for all travelers. Example: The group contains five travelers. Each traveler will incur a baggage fee of $20, so you must enter a single **Excess Baggage** expense of $100.

You must distribute those expense costs among the group members before you sign the authorization. Note that some expenses and allowances (e.g., driving distance to the trip starting point) may be different for each traveler. For those types of expenses, you must estimate the totals to get a good “should cost” for the overall trip and let each traveler update the mileage when they have access to their individual authorization.

### 2.6 Per Diem Module

Again, enter the per diem expenses as you would in a typical authorization, but make sure you enter the total lodging cost for all travelers. To repeat the previous example: The group contains five travelers who need lodging for 10 nights each. The TMC returns a total lodging cost of $10,000. The hotel therefore costs $200 per traveler per night, so you must enter a cost of $1,000/night (5 travelers x $200 = $1,000).

### 2.7 Accounting Module

Select the Lines of Accounting (LOAs) needed to pay for this trip. See below for information about scheduled partial payments and travel advances.

### 2.8 Additional Options Module > Group Travelers

The **Additional Options** module in a group authorization lets you perform the same actions as in a standard authorization, and offers one more screen – Group Travel Selection (the same screen described above). You access this screen by selecting **Additional Options** on the light blue navigation bar and then selecting **Group Travelers** on the light blue subnavigation bar.

Use this screen to update the group travelers (e.g., add new members, remove current members).

### 2.9 Additional Options Module > Partial Payments

On a group authorization, DTS will only request scheduled partial payments (SPPs) for the Primary Traveler. Other travelers who wish to request SPPs must wait until the group authorization is locked (see Section 3.3). At that point, each traveler can update their individual authorization to request SPPs.
2.10 Additional Options > Advances

Group authorizations do not permit requests for advances.

2.11 Review / Sign Module > Distributions

The **Review / Sign** module in DTS mostly lets you perform the same actions as in a standard authorization. In a group authorization, however, there is an additional screen. Selecting **Review / Sign** on the light blue navigation bar and then **Distributions** on the light blue subnavigation bar opens the Distributions screen (Figure 5-7).

As mentioned above, DTS displays all costs (expenses and allowances) as total trip costs. The Distributions screen lets you divide those costs amongst all group travelers as appropriate. You must distribute all cost items before the AO may approve the group authorization.

![Figure 5-7: Distributions Screen (Top)]
The Distributions screen initially displays brief instructions in the left column. The **Expenses Summary** in the right column displays all items that you must distribute, as well as options to:

- Include or exclude **Travel, Mileage & Non-Mileage Expenses**, and **Lodging / Misc.** expenses. Note that you must distribute them all, but you can choose to display only certain items at certain times.

- Display all expenses (**Yes** radio button) or hide those you have distributed (**No** radio button).

Distribute an expense by selecting an **Edit** link. The Cost Distribution screen (Figure 5-8) refreshes to display details of the selected item and options for distributing it. You can also look at expenses that display a **View** link, but DTS distributes them by rule. You can’t change their distribution type, and they don’t disappear from the list even if you selected the **No** radio button mentioned above.

![Image: Cost Distribution Screen (Top)]

**Figure 5-8: Cost Distribution Screen (Top)**
For each distributable expense, you must select a **Distribution Method**, and if offered, the travelers who will be included in the distribution. Options include:

- **Equal**: Makes each selected traveler responsible for paying the same dollar value

- **Amount**: Lets you designate a specific dollar value that each selected traveler will pay

- **Percent**: Lets you designate a specific percentage of the total dollar value that each selected traveler will pay

- **Single Traveler**: When amounts are not easily distributable (e.g., payment for a rental car), lets you nominate a single traveler to pay the total dollar value

### 2.12 Review / Sign Module > Preview

The Preview Trip screen (Figure 5-9) lets you review all the information in the authorization. Use it to review your entries. **Edit** links appear throughout to take you back to screens you need to update (for instance, if you discover you entered the wrong cost or an incorrect date).
Figure 5-9: Preview Trip Screen
2.13 Review / Sign Module > Other Auths.

*Other Authorizations* are official statements that must appear on your travel order. The Other Auths screen (Figure 5-10) presents some automatically based on selections you made in the authorization, and provides a link to add additional ones as needed. All Other Authorizations must include a comment. DTS provides comments for those it added automatically (though you can add additional comments to them). You must provide comments for Other Authorizations you add to the document.

![Figure 5-10: Other Authorizations Screen](image)

2.14 Review / Sign Module > Pre-Audit

The Pre-Audit Trip screen (Figure 5-11) contains two types of items:

1. Pre-audit flags that either indicate an expense that may break travel policy or exceeds established DoD cost thresholds. For each one, you must provide a justification to explain why the cost is necessary. Certain types of pre-audits (e.g., not using an available City Pair flight or a required lodging type) also require you to select a Reason Code that identifies the exception that allows the deviation from standard policy.

   The AO will use this information when deciding whether to approve the authorization.
2. Travel advisories that point out information that you may have forgotten. For example, one advisory lets you know that you have a rental car, but did not claim any gas for it. You do not have to justify advisories; they’re only there to help.

2.15 Review / Sign Module > Digital Signature

The Digital Signature screen (Figure 5-12) lets you sign and submit the group authorization. Before you do so, you can change the default routing list and provide comments to the AO. At any time, you can return to this screen to see the current document status.
When you attempt to digitally sign the group authorization, if you have not yet emailed your reservation requests to the TMC, a pop-up message displays to ask if DTS should send the email now. Select **OK** to send the email, which includes, among other administrative information:

- Contact information for the group POC
- Contact and payment information for each traveler in the group
- Type of request (e.g., cancellation, approval)
- Reservation requests (editable so you can add comments about them)
  - For example, if you request air tickets, the TMC requires Secure Flight Passenger Data as described in *DTS Guide 2: Authorizations* for all travelers.

**Notes:**
1) Some situations do not allow DTS to send the email (e.g., when the group authorization still contains unidentified travelers). You must correct any errors before you can send the email.
2) Do not digitally sign the group authorization until you have updated DTS with all reservation cost data and re-distributed the expenses, if necessary.

3) Attach the TMC’s response to the group authorization on My Expenses screen, in the Substantiating Documents area.

3 Unique Group Authorization Tools

On the DTS Dashboard (Figure 5-13), the Options menu contains several important tools that are unique to group authorizations. These are explained below.

Note: If you do not have group access to all the travelers named in the group authorization, you won’t be able to view, edit, amend, or print a group authorization.

![Figure 5-13: Group Authorizations Screen](image)

3.1 Print a Traveler Manifest

A manifest is a list of travelers in the group. You can easily display and print a traveler manifest, and can exclude names of specific travelers, if desired. The instructions below explain how:

1. Under Options, select View Group Manifest. Note: It only appears for documents the AO has approved. The Group Authorizations / Group Traveler List Screen (Figure 5-14) appears. Most items on that screen are self-explanatory. Table 5-1 explains the rest.

2. Select the Exclude box next to any traveler who should not appear on the manifest, then select Print Manifest. The DTS Traveler Manifest screen (Figure 5-15) opens. It contains contact information, itinerary information, and traveler information for each traveler you did not exclude.
This document is maintained on the DTMO website at https://www.defensetravel.dod.mil. Printed copies may be obsolete.
3.2 Remove or Release a Traveler from a Group

Removing and releasing a traveler is essentially the same action – you are indicating that the traveler will not travel with the group. The difference in terms is tied to the document status:

- If you take the action before AO approval, you can remove the traveler by selecting the remove link next to the traveler’s name on the Group Travel Selection screen (Figure 5-5). DTS does not create an individual authorization for removed travelers.
• If you take the action after AO approval, you can release the traveler by selecting the release link next to the traveler's name on the Group Authorizations / Group Traveler List Screen (Figure 5-14). See additional information in section 3.1. Releasing a traveler causes DTS to:

1. Immediately make the traveler's individual authorization available for editing. Subsequent changes to the group authorization will not impact the released traveler’s individual authorization. The traveler can cancel or amend the authorization, or create a voucher as needed.

2. Send an email to the traveler to explain the situation.

3.3 Lock a Group Authorization

“Locking” is an important concept for group authorizations, though it’s one that doesn’t affect any other DTS document type. It determines who can see and change an authorization, which documents those changes affect, and more.

Locking happens in two ways:

a. Manually: You can manually lock the group authorization any time after the AO approves it by selecting Lock Group Auth under Options (Figure 5-13).

b. Automatically: DTS automatically locks the group authorization three days after the trip end date if you have not locked it already.

Locking is a one-time action – you can never unlock a group authorization. Therefore, carefully consider the following facts when deciding when to lock the group authorization.

Before you lock the group authorization:

• Only the Primary Traveler, a NDEA, or a travel clerk can edit it.
• Changes, including cancellations, made to it affect all travelers’ individual authorizations.
• Group travelers may view, but not edit, their individual authorization.
• Group travelers may not request SPPs.
• Group travelers may not create vouchers from their individual authorization.
After you lock the group authorization:
- It becomes permanently view-only. You can never edit it again.
- Changes made to an individual authorization do not show up on any other individual authorization. This means that changes that affect all group travelers must be made on each individual authorization.
- Group travelers may edit their individual authorization.
- Group travelers may request SPPs, unless the trip has ended.
- Group travelers may create vouchers from their individual authorization.

3.4 Amend a Group Authorization

The process for amending a group authorization is identical to the process for amending a standard DTS authorization, with a few exceptions:

1. You can’t use the Travel module after you create the amendment. The TMC or TO must make any necessary reservation changes. Then you follow the standard process to update the reservation costs in DTS.

2. If the AO has approved the group authorization, you cannot change the routing list or add travelers to it.

3. As noted above, you cannot amend a locked group authorization.

4. Signing the amendment generates an email that you can send to the TMC. Send it or not as needed.

Note: If you make changes to the itinerary or reservations, you should always communicate the new information to all group travelers.

3.5 Amend an Individual Authorization

The process for amending an individual authorization is generally the same as the process for amending a standard authorization. The only difference is that the Create Amendment link not become available until the group authorization is locked.

3.6 Cancel a Group Authorization

Cancellation functions the same way as with a standard authorization, with one exception. If a Routing Official applies the CANCELLED stamp to the group authorization before it is locked, all individual authorizations are automatically cancelled as well. After the group authorization is locked, each group member must cancel their individual authorization.
## 4 Helpful Resources

<table>
<thead>
<tr>
<th>GUIDES</th>
<th>URL</th>
</tr>
</thead>
</table>
## OTHER RESOURCES

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</tr>
</tbody>
</table>

* Web-based training module is also available in Travel Explorer (TraX) at [https://www.defensetravel.dod.mil/passport](https://www.defensetravel.dod.mil/passport)