

Information Paper:

Self-Authorizing Officials in DTS

Summary

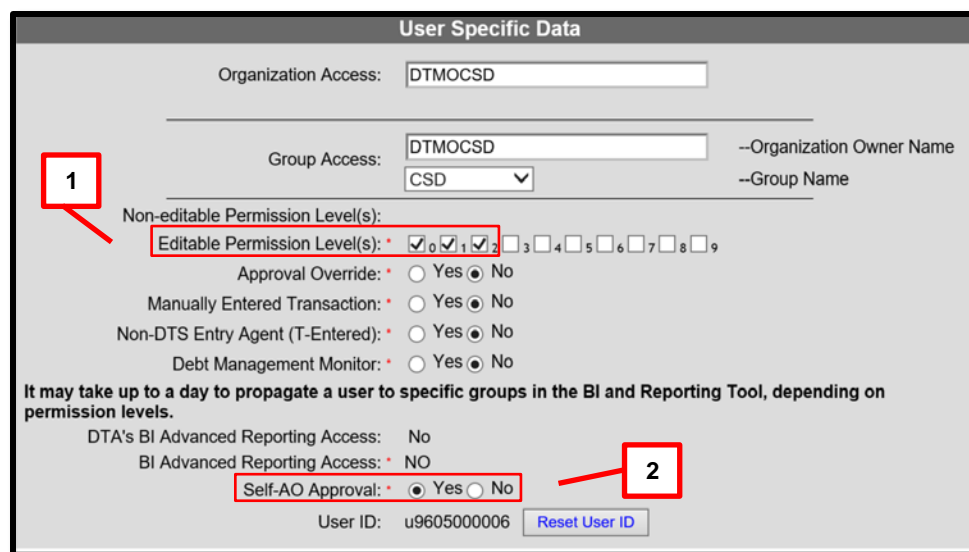
If you travel so frequently, and often-on short notice, your organization can consider designating you a *Self-Authorizing Official (SAO)* to expedite authorization approval. Per the [DTS Regulations, DoDI 5154.31](#) as a SAO, you can approve your own travel authorizations. However, to protect itself from undue risk of fraud, DoD stipulates that SAOs may not approve any of their travel documents containing payments. To ensure policy compliance, DTS incorporates system constraints preventing SAOs from approving their own payments. Your organization must identify another Authorizing Official (AO) to approve SAO authorizations with SPPs and/or travel advances and vouchers.

**In this information paper, you are the SAO. For your DTS role, you should comply with any required training as stipulated by your local business rules. The DTMO [Passport](#) portal provides access to variety of web-based training modules to support travel related topics. Your Defense Travel Administrator (DTA) must indicate you as a SAO in your personal profile. For more details on profile settings, refer to the [DTA Manual, Chapter 7: People](#).*

SAO Set-Up

When your organization designates you as a SAO, a DTA must perform the setup, so you can approve your own trips (with the limitations noted above). The DTA:

- Updates your personal profile to:
 - Grant permission level 2 (Figure 1, Indicator 1), so you can access the **Trips Awaiting Action** module.



User Specific Data

Organization Access: DTMOCS D

Group Access: DTMOCS D --Organization Owner Name
CSD --Group Name

Non-editable Permission Level(s):

Editable Permission Level(s): * 0 1 2 3 4 5 6 7 8 9

Approval Override: * Yes No

Manually Entered Transaction: * Yes No

Non-DTS Entry Agent (T-Entered): * Yes No

Debt Management Monitor: * Yes No

It may take up to a day to propagate a user to specific groups in the BI and Reporting Tool, depending on permission levels.

DTA's BI Advanced Reporting Access: No

BI Advanced Reporting Access: * NO

Self-AO Approval: * Yes No

User ID: u9605000006 [Reset User ID](#)

Figure 1: User Specific Data (Personal Profile)



SAO Set-Up (continued)

- Selects the **Yes** radio button indicator to grant **Self-AO Approval** (Figure 1, Indicator 2), which allows you to approve your own authorization.

*For more details on profiles, refer to the [DTA Manual, Chapter 7: People](#).

- Creates a routing list that includes, at a minimum:
 - You as the AO, for travel documents you may approve
 - Another AO, to approve your travel documents with payments

Routing list options include:

- The DTA builds a single routing list for your organization, which supports all travel approval and SAO authorization only approval, when required.
- The DTA builds an additional routing list for use when the SAO will approve their own authorizations, which includes other AOs to approve vouchers.

Note: Follow your local business rules on SAO routing setup.

* For more details on routing lists, refer to the [DTA Manual, Chapter 5: Routing Lists](#).

Verify SAO Set-Up

Before you create an authorization and try to apply self-approval, you should verify that the setup is in place. Here is how to check:

- **Permission level 2:** From the **DTS Dashboard**, upper right hand corner, select your name (Figure 2, Indicator 1) to open the window. Review the information confirming your **Permissions** includes permission level 2 (Figure 2, Indicator 2).

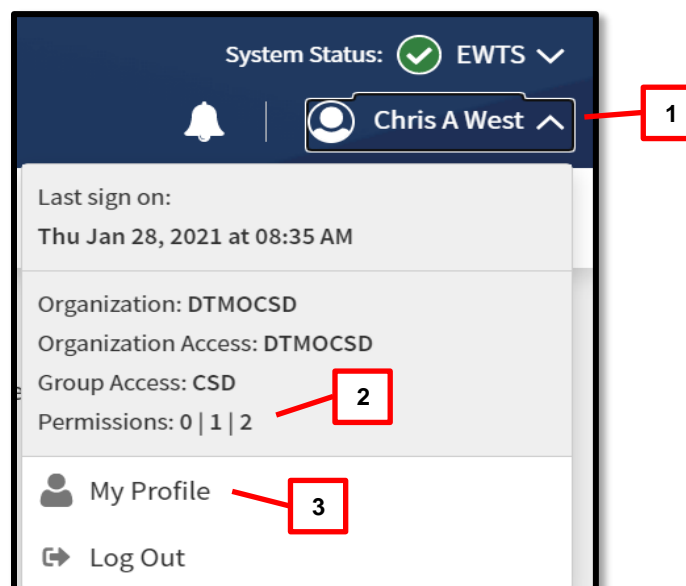


Figure 2: DTS Dashboard (Current Session Info)



Verify
SAO
Set-Up
(continued)

- **Self AO Approval** access: Immediately below the **Permissions** information, select **My Profile** (Figure 2, Indicator 3). When your profile opens, select **Duty Station** (Figure 3, Indicator 1) to open the **Duty Station** screen and verify the **Self AO Approval** option is set to **Yes** (Figure 3, Indicator 2).

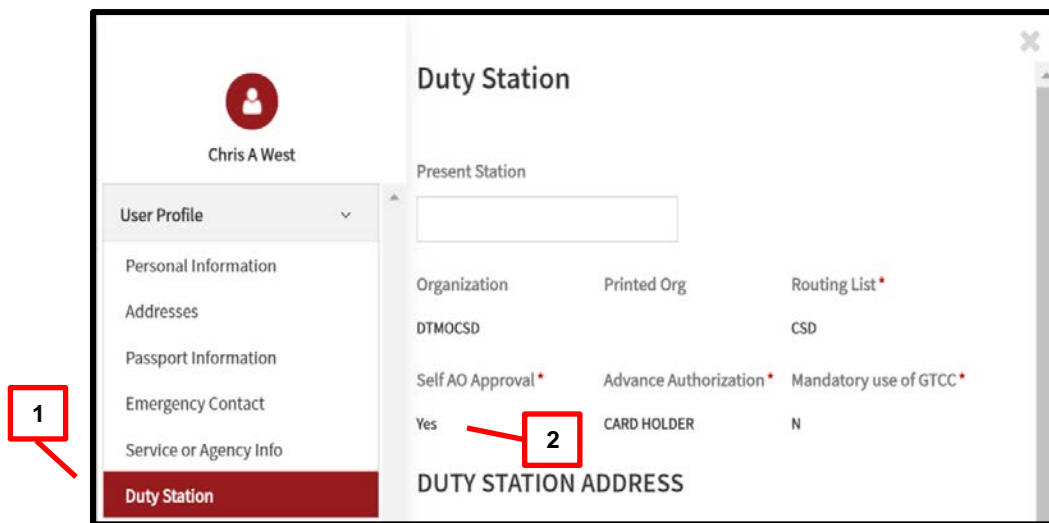


Figure 3: My Profile (Duty Station Information)

- **Check the routing list:** From the **DTS Dashboard**, select **Travel Tools** (Figure 4, Indicator 1) and a drop-down listing appears. Select **Routing Chain Lookup**.

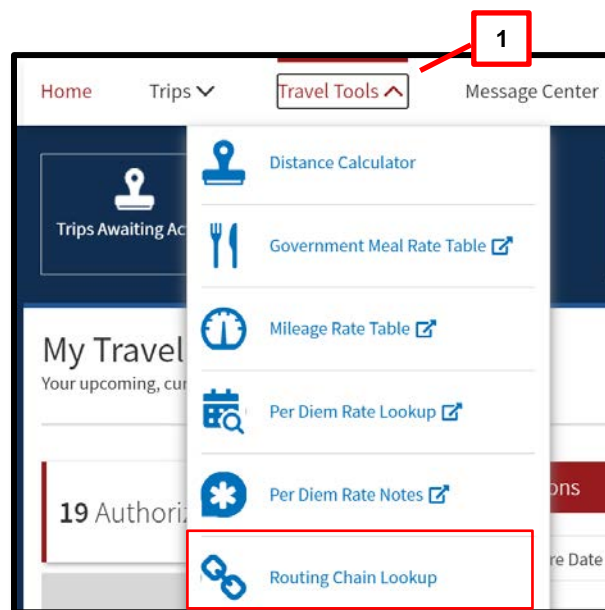
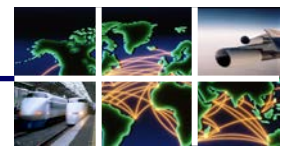


Figure 4: Travel Tools Screen

The **Look Up Routing Chain** screen opens (Figure 5).



Verify
SAO
Set-Up
(continued)

Routing Chain Lookup
Select an organization to view your routing chain of command so you know where your document needs to go.

Organization: 1 Routing List: 2

Authorization Routing List

STATUS	STATUS ISSUER	LEVEL	PROCESS NAME
APPROVED	Chris A Plummer Chris A West Helen D DTMO Helen D West	25	
CTO BOOKED	**CTO BOOKED	3	BYPASS_PNR
CTO SUBMIT	**CTO SUBMIT	2	BYPASS_PNR

Voucher Routing List

STATUS	STATUS ISSUER	LEVEL	PROCESS NAME
APPROVED	Chris A Plummer Chris A West Helen D West	25	

Local Voucher Routing List

STATUS	STATUS ISSUER	LEVEL	PROCESS NAME
APPROVED	Chris A Plummer Chris A West	25	

Figure 5: Look Up Routing Chain Screen

From the drop-down menu, select the **Organization** (Figure 5, Indicator 1) and then select the **Routing List** (Figure 5, Indicator 2) to view the routing list details. The routing list, at a minimum, should reflect you and at least one other person applying the **APPROVED** status for authorizations (Figure 5, Indicator 3).

Depending upon how your organization implements SAO routing setup (single or additional routing list), the routing list details should include more than one AO for all document types to prevent processing delays. For SAO trips with payments, DTS requires another AO to approve for auditability. If you have any questions regarding the routing list details, contact your local DTA.

Approving
Your Own
Authorization

Once the DTA completes the setup, you can create your authorization. You will process the document (e.g., itinerary, reservations, and expenses) as normal, but you will verify your document displays the proper routing list (e.g., you are one of the AOs). After you apply **SIGNED**, the document routing starts. You can approve the trip immediately, unless one or both of the following are true:



Approving Your Own Authorization (continued)

- Your trip contains reservations requiring the Travel Management Company (TMC; what DTS calls a Commercial Travel Office [CTO]) support, in which case, add up to 24 hours for that process to complete.
- Your routing list includes reviewers who must take action prior to approval. The amount of time it takes for the document to route to you, all depends upon the number of reviewers on the routing list and their availability to take action.

*For more information about creating authorizations, see [DTS Guide 2: Authorizations](#).

Based upon the email indicated in your personal profile, DTS notifies you when the authorization is available for approval. **Note:** When you review your trip, give the same care as you would for any other travel document, ensuring policy compliance and travel justifications where warranted.

When you are ready, access DTS and do the following:

1. From the **DTS Dashboard**, select **Trips Awaiting Action**, then open the authorization from the document listing.
2. Carefully review the trip, particularly the **Review Trip** <document type> and the **Other Auths and Pre Audits** screens. If anything requires correction, do so before proceeding to the **Digital Signature** screen.
3. On the **Digital Signature** screen:
 - a. Make sure **APPROVED** displays in the **Document Status** field.
 - b. Make sure the correct routing list displays in the **Routing List** field.
 - c. Enter any necessary **Additional Comments**.
 - d. Justify any **Pre Audit** flags.
 - e. Select **Submit Completed Document**.
 - f. Select **Confirm and Continue**.

*For training on how to review trips in DTS, log into the **TraX** via **Passport**, and take the WBT, [AO/RO – The DTS Approval Process](#).

Resources

There are a number of resources available to assist Authorizing Officials (AOs) with approving travel, which includes, but not limited to:

- [Joint Travel Regulations \(JTR\)](#)
- [DTS Regulations](#)
- [GTCC Regulations](#)
- Your local business rules



**Resources
(continued)**

- [Desktop Guide for Authorizing Officials](#)
- [Authorizing Official Checklist and Instructions](#) - Trifold
- [TraX](#) – Web Based Training (WBTs)
 - Travel Policy
 - Rental Car
 - AO/RO – The DTS Approval Process
 - Vital Skills for Authorization Officials
 - Vital Skills for Authorization Officials: Applied

**A Final Word
on SAO
Appointments**

Each organization is responsible for deciding who needs to be a SAO, when to make such designations, and when to remove them. There is no regulatory requirement for an organization to have SAOs.