



*Defense Travel System*

Invitational Travel Procedures Guide

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## Revision History

Revision Number	Date	Authorization	Revision/Change Description	Chapter
1.0	09/12/05	Program Management Office – Defense Travel System (PMO-DTS)	Procedures for processing Invitational Travel Authorizations in DTS	All Chapters
1.1	12/05/05	PMO-DTS	Modified personal charge card entry information.	All Chapters
2.0	06/27/08	Defense Travel Management Office (DTMO)	Updated guide to comply with current regulations	All Chapters
3.0	11/05/09	DTMO	Updated to reflect new DTS functionality	All Chapters
4.0	12/21/10	DTMO	Updated to reflect new DTS functionality	All Chapters
5.0	01/19/11	DTMO	Updated to reflect new web links	All Chapters
6.0	06/29/12	DTMO	Inserted JTR (Vol. 2) compliance changes per PDTATAC staff D12001 review memo IAW DoDI 5143.19.	All Chapters
6.1	11/14/12	DTMO	Added additional guidance regarding requirement that individuals that have ITAs created in DTS must have a DTS profile.	All Chapters
6.2	10/24/14	DTMO	Updated JTR references and hyperlinks. Inserted current screenshots.	All Chapters
6.3	09/13/17	DTMO	Updated with new screenshots & procedures.	All Chapters
7.0	02/16/18	DTMO	Updated screenshots	Chapters 2-3
7.1	08/17/18	DTMO	Updated for access through DTS Dashboard.	Sections 2.1-2.4 & 3.1
7.2	12/14/18	DTMO	Edited to reflect DTS update of voucher screens.	Section 3.1
7.3	04/26/19	DTMO	Edited credit card to charge card. Updated the Trip Type and Trip Purpose screens Add new expense screens	Section 2.2
7.4	05/03/19	DTMO	Screen shot update	Section 2.3
7.5	06/08/20	DTMO	General review Updated screen shots	Throughout Section 3

**Note:** “This instruction has been reviewed by the Per Diem, Travel and Transportation Allowance Committee staff in accordance with DoDI 5154.31, Volume 5, dated 8 October 2015, as PDTATAC Case D20001.”

# 1 Introduction

In certain circumstances, DoD organizations may authorize official travel for people who are not civilian employees or uniformed Service members. We refer to such travel as *invitational travel*. You\* may use the Defense Travel System (DTS) to create invitational travel authorizations (ITAs) and vouchers for eligible individuals.



This guide addresses how to create ITAs in DTS, but it does not contain comprehensive instructions about DTS document processing. This mark – † – appears when you must follow standard DTS authorization or voucher processes. An explanation of those processes are available in [DTS Guide 2: Authorizations](#) and [DTS Guide 3: Vouchers](#).

The [Joint Travel Regulations \(JTR\)](#), particularly par. 0305, explains how to determine a person's eligibility for invitational travel and allowances eligible individuals may receive.

*\*In this guide, "you" are a Non-DTS Entry Agent (NDEA) or travel clerk; however, please remember that a travel clerk cannot sign vouchers for other travelers. Only a NDEA can perform signing of voucher on behalf of traveler.*

You can find the references highlighted in this guide at:

- **JTR:** <https://www.defensetravel.dod.mil/Docs/perdiem/JTR.pdf>
- **DTS Guide 2: Authorizations:**  
[https://www.defensetravel.dod.mil/Docs/DTS\\_Guide\\_2\\_Authorization.pdf](https://www.defensetravel.dod.mil/Docs/DTS_Guide_2_Authorization.pdf)
- **DTS Guide 3: Vouchers:**  
[https://www.defensetravel.dod.mil/Docs/DTS\\_Guide\\_3\\_Voucher.pdf](https://www.defensetravel.dod.mil/Docs/DTS_Guide_3_Voucher.pdf)

## 2 Invitational Travel Authorization (ITA)

This section explains how to create an ITA, with a focus on how an ITA differs from a standard TDY authorization. It does not cover the steps you use to create standard TDY authorizations in DTS<sup>†</sup>.

The ITA process begins when your organization identifies a need for an ITA-eligible person to travel at DoD's expense. Processing of invitational travel is with mutual consent, meaning the organization must invite the person to travel, and the traveler must accept the invitation.

Use the following JTR paragraphs to determine if a prospective traveler is eligible for invitational travel:

- Non-DoD travelers must meet the requirements in *JTR, par. 030501-A* and none of the restrictions highlighted in *JTR, par. 030501-C*.
- Spouses accompanying invited travelers for “a representational purpose that is not mission essential” must meet the requirements in *JTR, par. 030502-A*.
- DoD-employed consultants and experts must meet the requirements in *JTR, par. 030503-A*.

Before you can create an ITA, the traveler must have a DTS profile and be a member of a group that you can access. Meaning a Defense Travel Administrator (DTA) must:

- Create or receive the traveler's DTS profile in the organization that controls the funding and set the routing list needed for the ITA.
  - For foreign nationals who don't have a Social Security number (SSN), the DTA can use the traveler's Taxpayer Identification Number (TIN) instead. If the traveler has neither a SSN nor a TIN, consult your Component's business rules.
- Put the traveler into a group and give you access to that group.

### 2.1 Create the Itinerary

Follow the steps listed below to create an ITA:

1. From the **DTS Dashboard**, select **Trips** then **Traveler Lookup** (Figure 2-1) to open the **Traveler Lookup** screen (Figure 2-2).

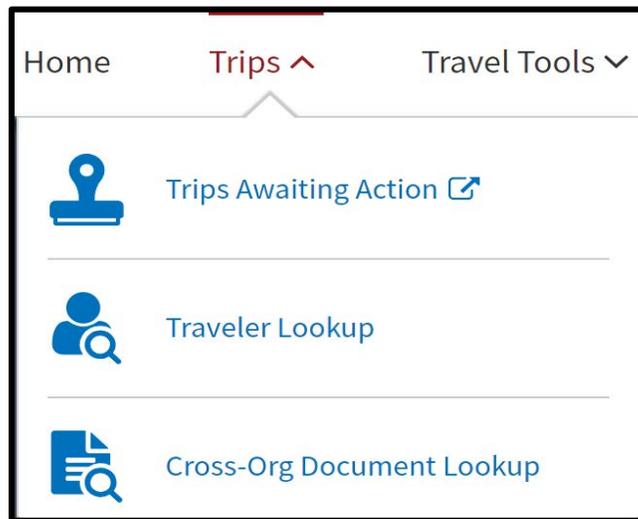


Figure 2-1: DTS Dashboard – Trips Menu

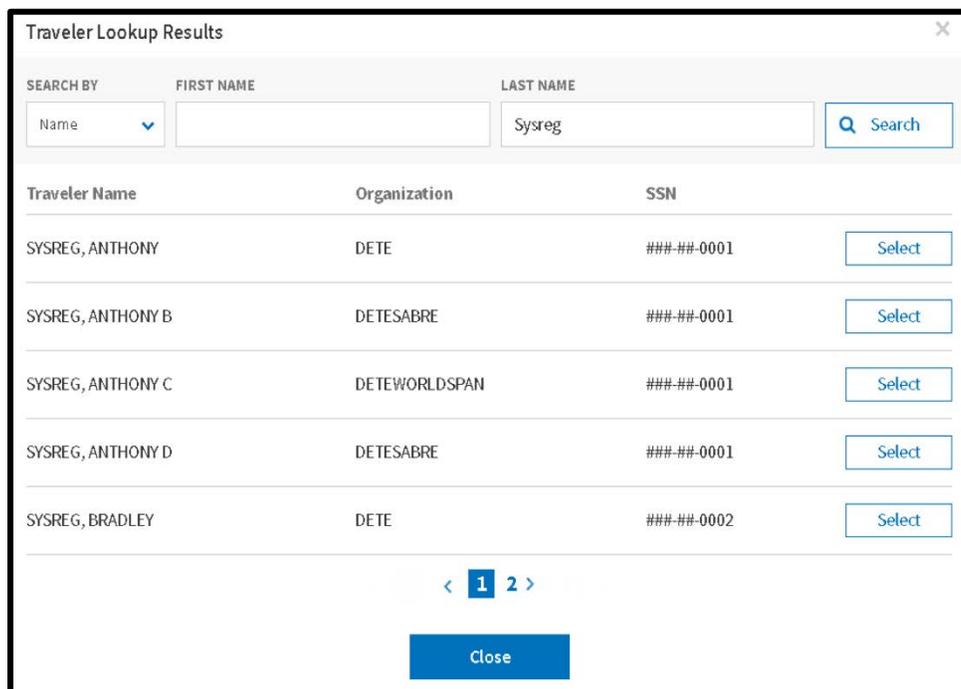


Figure 2-2: Traveler Lookup Screen

2. **Search** for the traveler. Results appear at the bottom of the screen. Search options include:
  - o By traveler’s **Name** (pictured in Figure 2-2): Last name (full or partial) is mandatory. First name (full or partial is optional).

- By **SSN**: For foreign nationals, you can enter the traveler’s TIN or a number approved by your Component instead.

3. In the **Search Results** area, **Select** the person you want to create the authorization for travel. The selected person’s **DTS Dashboard** opens.

**Note:** If the traveler’s name does not display, contact your DTA to verify that the traveler has a DTS profile and that you have group access to the group the traveler belongs to.

4. Select **Create New Document**. The window displays options.

5. Select **Routine TDY Trip**.

6. Complete the required itinerary fields for **Arriving/Departing** dates, **TDY Location**, mode of travel (Air, Train, Private Auto/Motorcycle), **Rental Car** (Yes or No), **Leaving From/Returning To** working your way down the page (Figure 2-3).

**YOUR TDY LOCATION(S)**

Arriving:  Departing:  TDY Location:  Traveling By:  Time of Day:  Rental Car?:  +

---

**TRIP OVERVIEW**

Leaving On:  Returning On:

Leaving From:  My Residence  My Duty Station

Returning To:  My Residence  My Duty Station

Trip Duration:

Returning By:

Time of Day:

Figure 2-3: Itinerary Screen

7. Under **Type**, select the appropriate **Invitational Travel** indicator based upon travel need (Figure 2-4). The **Trip Type** selection drives your

allowances and reimbursements.

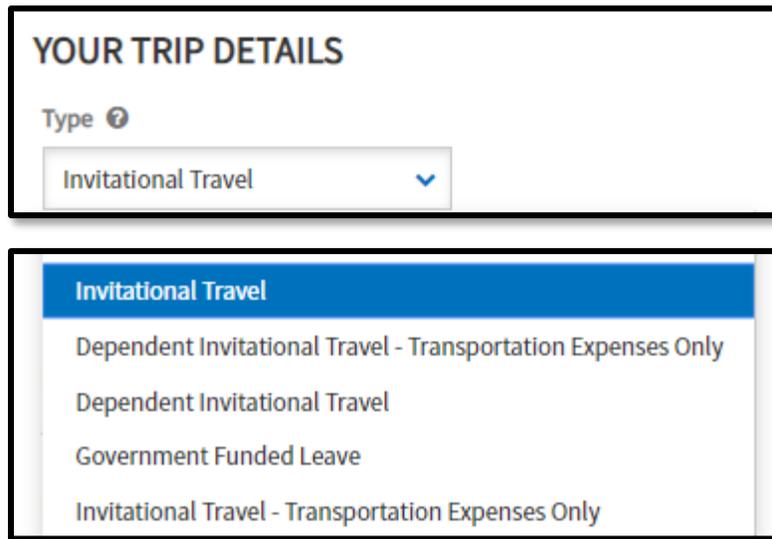


Figure 2-4: YOUR TRIP DETAILS Screen

**Note:** For additional information for authorizations see the in [DTS Guide 2: Authorizations](#)<sup>†</sup>.

8. Select **Trip Purpose** to see the options to select for the travel reason (Figure 2-5). Select the correct reason for your travel needs. If uncertain, contact the DTA for guidance.

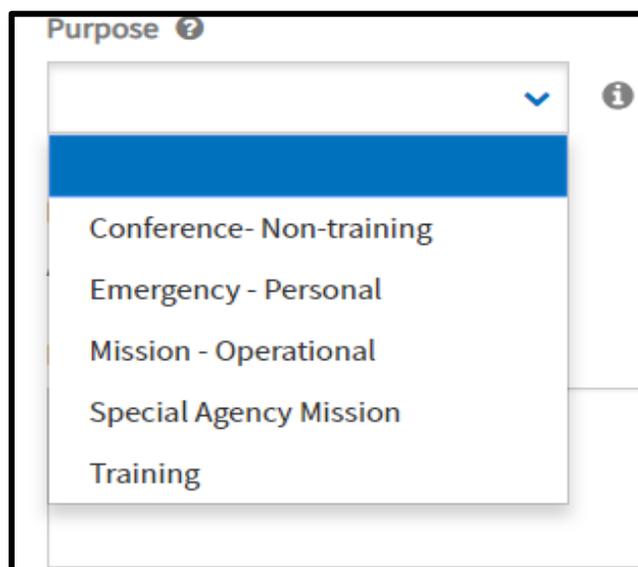


Figure 2-5: (Trip) Purpose Screen

9. Determine if you need to add a dependent to the travel authorization. Select **Add Dependents** to create the required entry. If you don't need to a dependent, then skip to the **Description** field.

**Add Dependents**

All routing, accounting and reimbursement is made to the sponsor. Create a new dependent or select from the list below.

**Create New Dependent**

**Name\***

First name\* Middle Initial Last name\*

**Relationship** Spouse Relationship

**DOB\*** MM/DD/YYYY

**Passport ID** Passport ID

**Passport Exp Date** MM/DD/YYYY

**TSA KTN** Known Traveler Number

**TSA Redress Number** TSA Redress Number

**Create**

**Select An Existing Dependent**

Select	Name	Relationship	DOB	Passport ID	KTN	Redress#	Actions
No data available in table							

Cancel Save

Figure 2-6: Add Dependents Screen

- In the *Create New Dependent* section, complete the required fields for **First, Middle Initial and Last Name, Relationship**, and Date of Birth (**DOB**). **TSA** information is available to add as well as **Passport** data. Select **Create** to save the entry (Figure 2-6).
- If the individual's information already has a record, then *Select An Existing Dependent* section to add the person to the trip (Figure 2-7).
- Once you add the person, the available actions are edit and delete the record.

### Add Dependents

All routing, accounting and reimbursement is made to the sponsor. Create a new dependent or select from the list below. ?

**Create New Dependent**

**Name\***

**Relationship**

Spouse
▼

**DOB\***

MM/DD/YYYY

**Passport ID**

Passport ID

**Passport Exp Date**

MM/DD/YYYY

**TSA KTN**

Known Traveler Number

**TSA Redress Number**

TSA Redress Number

Create

**Select An Existing Dependent**

Select	Name	Relationship	DOB	Passport ID	KTN	Redress#	Actions
<input checked="" type="radio"/>	Ramirez, Carla A.	Child	08/30/2010				✎ 🗑

Cancel
Save

Figure 2-7: Select an Existing Dependent Screen

- Select **Save** to record the entry. **Note:** The dependent’s information saves to the traveler’s permanent profile.
  
- The information displays under **Dependents** (Figure 2-8). **Note:** The routing, accounting and reimbursement are all associated to the traveler’s profile.

**YOUR TRIP DETAILS**

**Type** ?

Invitational Travel

**Purpose** ?

Mission - Operational

**Dependents**

[1 Dependent Selected](#)

Name	DOB
Ramirez, Carla A.	08/30/2010

*Description (optional)*

Figure 2-8: Dependent Added

10. Enter comments under **Description** if required.
11. Complete **Conference/Event Name** question (Yes or No). If yes, use the drop-down menu to select the conference or event name. If the item is not in the listing, select **Other**.
12. Select **Continue**.

## 2.2 Select Reservations

In general, you follow the usual steps<sup>+</sup> to make travel and lodging reservations, but only if the traveler is authorized reservations.

If making air reservations, DTS brings you to the **Enter Your TSA Info For This Trip** window. You must complete any mandatory fields before searching for reservations. Optional fields include **Known Traveler Number** and **Redress Number**, if issued by TSA. Select **Continue to Booking**.

After selecting air reservations, the required the *Payment Summary* (Figure 2-9) area asks you to select the method of payment. In most cases, you'll use **Centrally Billed Account (CBA)** for air or train reservations and **Personal** for rental car and lodging reservations.

**PAYMENT SUMMARY**

Method of Payment

**TOTAL COST**  
**\$179.30**  
Includes taxes and fees

[< Back](#) [Book Flight >](#)

Figure 2-9: Review Reservation Selections Screen – Method of Payment Entry

In addition, when making lodging reservations, when the traveler’s DTS profile does not contain charge card information, DTS provides fields in the *Payment Summary* area (Figure 2-10) to enter the traveler’s personal credit card information. If you don’t have that information, the traveler must book the hotel outside DTS.

**PAYMENT SUMMARY**

VISA Mastercard AMERICAN EXPRESS DISCOVER Diners Club JCB

Name on Card \*

Card Number \*

Expiration Date \*

(NOTE: This card will not be saved to your permanent profile.)

Daily Cost **\$83.00**

EST. TOTAL COST **\$498.00**  
excludes taxes and fees

Figure 2-10: Credit Card Information Entry Fields

Continue making authorized reservations for the traveler following the usual process.

## 2.3 Complete the ITA

After you get beyond the **Reservations** module, you mostly follow the usual steps<sup>†</sup> to complete the ITA. Follow the standard processes in the **Expenses** (if authorized), **Per Diem** (if authorized), **Accounting**, and **Review** modules.



The most important thing to remember is only include in the authorization items that *JTR, par. 030501-B* (non-DoD travelers), *030502-B* (accompanying spouses), or *030503-B* (DoD-employed consultants and experts) specifically allows.

In the **Review** module, most screens behave in the usual way<sup>†</sup>, though you'll notice that the **Other Auths and Pre Audits** screen automatically always displays an **E-INVITATIONAL** entry (Figure 2-11). You can provide additional comments if your local business rules require you to do so.

The screenshot shows a web interface titled "Other Authorizations". At the top right is a blue button with a plus icon and the text "Add Other Authorization". Below the title, there is a paragraph: "The following are the additional authorizations that were selected based on the trip details. Enter comments to your Approving Official below." Underneath this is a list of "E-INVITATIONAL" entries. At the bottom of the list is a text input field labeled "Comments" and a blue button with a plus icon and the text "Add Comments".

Figure 2-11: Other Auths and Pre Audit Screen: E-INVITATIONAL Other Authorization

Once you justify any flags, proceed to the **Digital Signature** tab. On this screen, you should:

1. View the current document status.
2. See the stamp DTS will apply when you submit the document. Check the box, **I agree to SIGN this document**.
3. Change the routing list, if needed. Follow your local guidance to determine the correct routing list to use.
4. (optional) Add Comments to the AO.
5. **Submit Completed Document** with the displayed stamp. Unless DTS detects a problem with the document, it provides a successful signing message.

Upon successful signing message, the document routes to the TMC for reservations (if applicable) and then onto the AO for approval.

## 3 Vouchers from ITAs

This section explains how to create a voucher from an ITA. Like the previous section, it focuses on the process to create a voucher from an ITA if differs from the process to create a voucher from a standard authorization. It does not cover the steps to create a voucher from a standard TDY authorization<sup>†</sup>.

To request reimbursement for expenses incurred or allowances earned on invitational travel, the traveler must complete and sign a paper or electronic *DD Form 1351-2*. You must receive the signed *DD Form 1351-2* by the traveler, all required receipts, and any other supporting documentation to process a voucher in DTS.

**Note:** DTS can only make payments in U.S. dollars and to U.S. financial institutions. If the traveler does not have an account at a U.S. financial institution, the Defense Finance and Accounting Service (DFAS) sends a paper check, in U.S. dollars, to the mailing address in the traveler's profile.

### 3.1 Create a Voucher from an ITA

After you receive the required paperwork (see Section 3.0) from the traveler, create the traveler's voucher using a process similar to the one you used to create the authorization.

1. From the **DTS Dashboard** (see Figure 2-1), select **Trips**, and then **Traveler Lookup**.
2. Use steps 1-3 as listed in Section 2.1 to find the traveler.
3. On the traveler's **DTS Dashboard**, select **Create New Document**, then **Voucher**.
4. Follow the standard process to create and complete the voucher<sup>†</sup>. **Note:** You must ensure that everything you enter matches the content of the traveler signed *DD Form 1351-2* provided to you.
5. From the **Progress Bar**, select **Expenses**. The **Enter Expenses** page opens allowing you to select **Add**, to electronically attach the *DD Form 1351-2* before you digitally sign the voucher. The attached document displays on **Enter Expenses** page and on the **Review Trip Voucher** screen under **Substantiating Documents** (Figure 3-1).

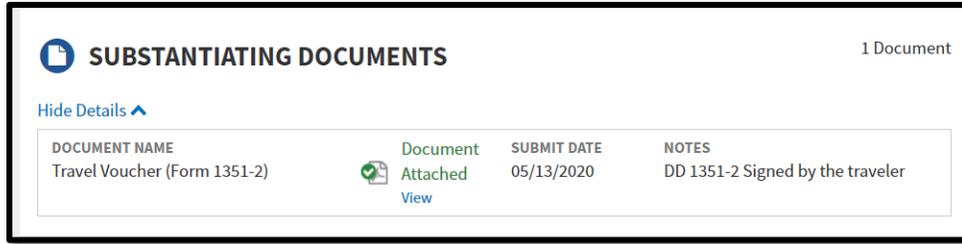


Figure 3-1: Substantiating Documents

- To digitally sign the voucher make sure **T-ENTERED** displays as the **Document Status** on the **Digital Signature** screen (Figure 3-2), then follow the usual steps<sup>†</sup>.

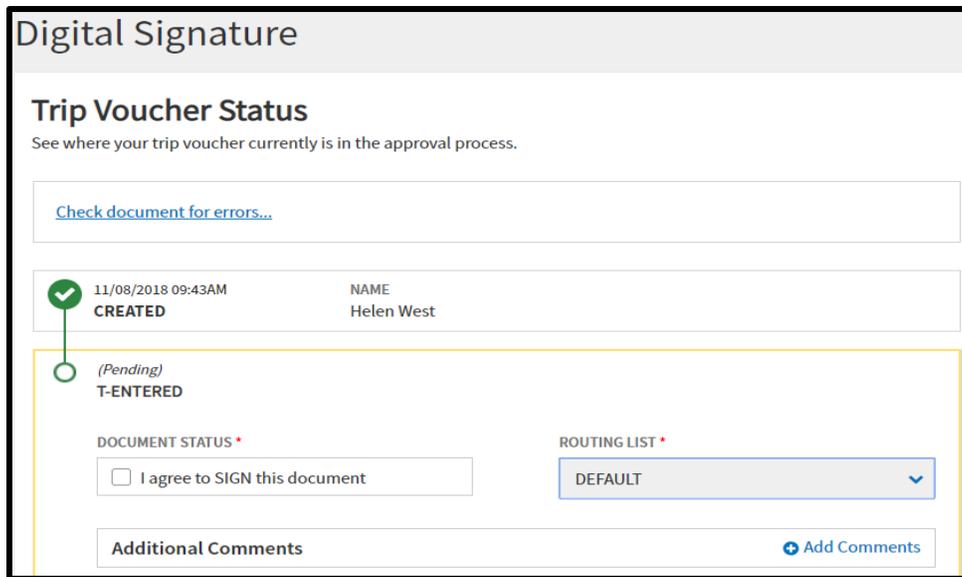


Figure 3-2: Digital Signature Screen (Top)

## 4 Additional Cautions

### 4.1 For the Authorizing Official

Before a NDEA may sign a voucher for a traveler, the traveler must give the NDEA a signed paper or electronic *DD Form 1351-2*. If the traveler is not familiar with the *JTR's* directives on Invitational Travel (*Chapter 3, par. 0305* and sub-sections), they may mistakenly request payments in the *DD Form 1351-2* that the *JTR* does not allow.



The NDEA must accurately transfer the information the traveler provided from the *DD Form 1351-2* into DTS. When invitational travel is in play, the Authorizing Official (AO) must be doubly careful to make sure they do not approve any payments the *JTR* does not allow. If an invalid payment request appears on the DTS voucher, the AO can either make the necessary changes themselves, or return it to the NDEA, who must request an updated *DD Form 1351-2* from the traveler before they can change the DTS voucher.

### 4.2 For the Defense Travel Administrator

After travel is complete and the traveler receives their voucher payment, the DTA should detach the traveler's profile from the organization.

Detaching the traveler ensures the next time the traveler performs TDY for DoD, the organization can receive the profile into the funding organization.