Defense Travel System

Invitational Travel Procedures Guide

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1 Introduction

In certain circumstances, DoD organizations may authorize official travel for people who are not civilian or uniformed Service member employees. 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.


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:

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†.

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.

To be eligible for invitational travel, a prospective traveler must meet all the requirements stated in JTR, par. 030501, and none of the exceptions highlighted in JTR, par. 030501-C.

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 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).
2. **Search** for the traveler. Results appear at the bottom of the screen. Search options include:

   - 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).

![Figure 2-3: Itinerary Screen](image)

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](https://www.defensetravel.dod.mil).

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.

**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.
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.
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 to make travel and lodging reservations, but only if authorization provided to the person.

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.
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.

Continue making reservations following the usual processes, but only for those which the person is authorized.

2.3 Complete the ITA

After you get beyond the Reservations module, you mostly follow the usual steps† 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, Chapter 3, 0305 Invitation to Travel, par. 030501 specifically* allows. For an ITA of the spouse of a service member or civilian employee who is authorized to travel for a “representational” (i.e., non-mission essential) purpose, see *par. 030501* for guidance.

In the Review module, most screens behave in the usual way†, 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.

![Other Authorizations](image)

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

## 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†.

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, 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. Note: You must ensure that everything you enter matches the content of the DD Form 1351-2 the traveler provided to you.

5. You must electronically attach the DD Form 1351-2 before you digitally sign the voucher. Follow the usual steps to import the image of a paper document into DTS (Figure 3-1).

![Figure 3-1: Substantiating Documents](image)

6. 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.

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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.