Defense Travel System

Invitational Travel Procedures Guide

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**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 voucher signing 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 all 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. When required obtain an ITA pre-approval as outlined in the JTR, Table 3-2.1 5 U.S.C. § 5703 Authorizing Official.

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-D.

- Spouses must meet the requirements in JTR, par. 030501-A12. If traveling with the DoD sponsor on a Government aircraft, follow the JTR, par. 030502. Spousal Travel by Government Aircraft.

- DoD-employed consultants and experts must meet the requirements in JTR, par. 030501-A.

Before you can create an ITA, a Defense Travel Administrator (DTA) must:

- Create or receive the traveler’s DTS profile into the organization funding the trip.
  - For foreign nationals who do not 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.

- Ensure the proper routing list is associated to the profile for ITA approval.

- Add the traveler into a group and give you access to that group.

- Ensure the proper LOA with ample funds are available to support the trip.

- If using a Centrally Billed Account (CBA) for airfare or rail travel make sure the information is available. **Note:** CBA is not for hotel or rental car use.
2.1 Create the Itinerary

Follow the steps listed below to create an ITA:

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

![Figure 2-1: DTS Dashboard – Trips Menu](image)

2. Search for the traveler by Name, TA Number or SSN.

![Figure 2-2: Traveler Lookup Screen](image)
• By traveler’s **Name**: 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.

• By **TA Number**: Enter the 6-digit code to locate approved documents.

**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 traveler’s group.

3. From the **Traveler Lookup Results**, **Select** the person you want to create the authorization for travel. The screen updates displaying **Managing Trips for: Traveler Name** (Figure 2-3) and any documents processed for the traveler.

4. Select **Create New Document** (Figure 2-3). 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 2-4).
7. Under **Type**, select the appropriate **Invitational Travel** indicator based upon travel need (Figure 2-5). The (Trip) **Type** selection drives your allowances and reimbursements.

**Note**: Government Funded Leave (Trip) **Type** will only appear in the list under certain conditions. For additional information for authorizations see the in **DTS Guide 2: Authorizations**.
8. Select **Purpose** to see the list of travel reason options (Figure 2-6, Indicator 1). Select the correct reason for your trip. If uncertain, contact the DTA for guidance.

![Figure 2-6: Your Trip Details Section of the Itinerary Screen](image)

9. Determine if you need to add a dependent to the travel authorization. Select **Add Dependents** to create the required entry (Figure 2-6, Indicator 2). If you don’t need to add a dependent, then skip to the **Description** field.
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 2-7).

- If the individual’s information already has a record, then **Select An Existing Dependent** section to add the person to the trip (Figure 2-8).

- Once you add the person, the available actions are edit and delete the record.
Figure 2-8: 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 2-9). **Note:** The routing, accounting, and reimbursement are all associated to the traveler’s profile.

Figure 2-9: 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† 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 2-10) 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.

![Image of Payment Summary](image)

*Figure 2-10: 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 2-11) 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 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 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 and 030502 specifically allows.

In the Review module, most screens behave in the usual way, though you’ll notice that the Other Auths and Pre Audits screen automatically displays an E-INVITATIONAL entry (Figure 2-12). You can provide additional comments if your local business rules require you to do so.
Once you justify any flags, scroll to the bottom of the page to select **Continue** or choose **Sign and Submit** from the **Progress Bar** to proceed to the **Digital Signature** page. 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.
4. (optional) **Add Comments** about the trip.
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, 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.

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. When the Traveler Lookup screen opens, use steps 1-3 as listed in Section 2.1 to find the traveler.


4. Follow the standard process to create and complete the voucher†. Note: You must ensure that everything you enter matches the content of the traveler signed DD Form 1351-2 provided to you. Attach any lodging receipt and receipts for expenses of $75.00 or more.

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).
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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**Figure 3-1: Substantiating Documents**

**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. Carefully review the information as the traveler may not familiar with the JTR’s directives on Invitational Travel. Do not 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 only approve payments the JTR allows. 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.