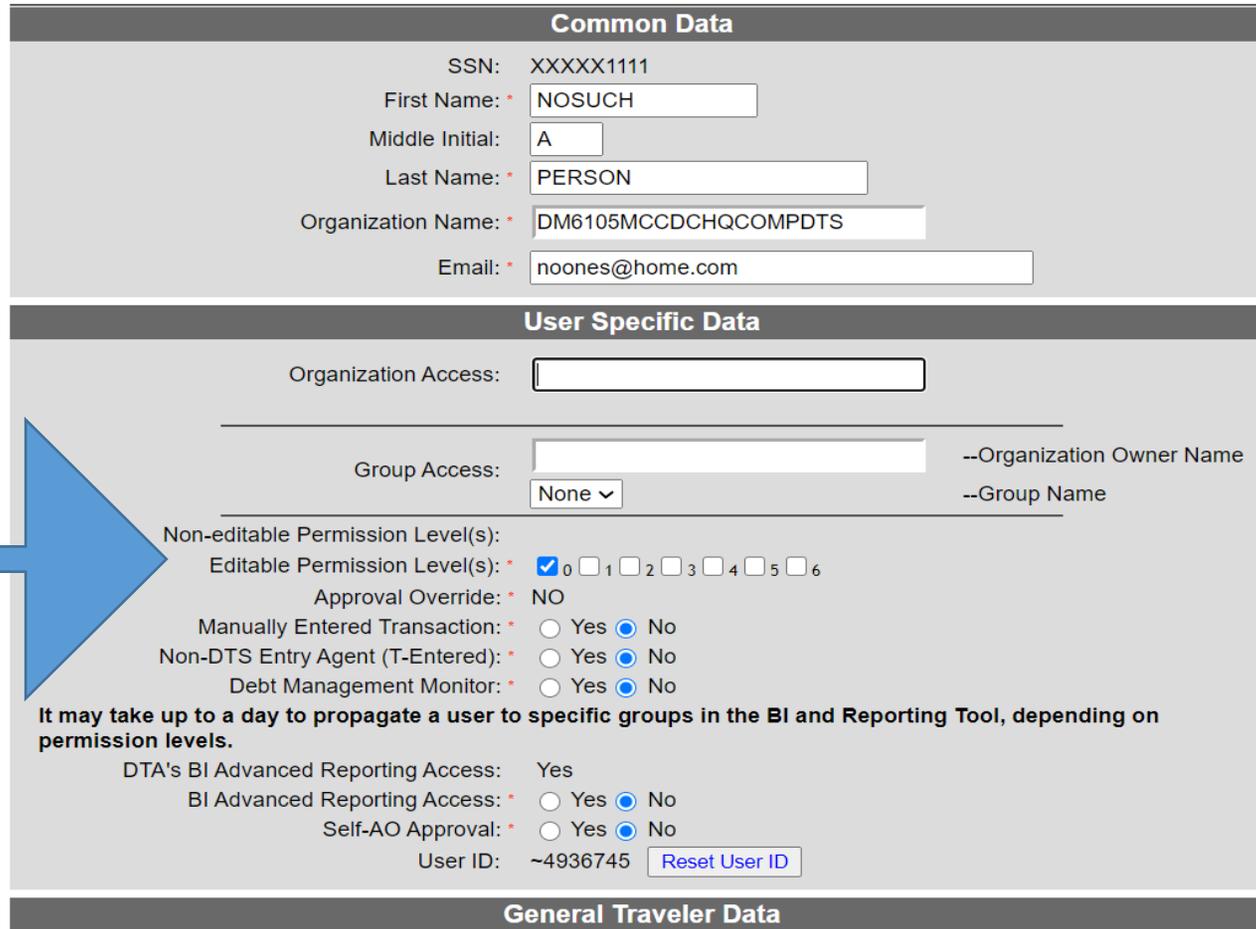


Helpful Tip for the only "Permission Level" ODTA's are authorized grant

For Traveler & User profiles, ODTA's can Grant/Place a check-mark to the left of zero "0" within the **Editable Permission Level(s)** under the **User Specific Data** section of the profile when building a new (or) receiving a self-registration profile. Other than adding a zero "0", the **User Specific Data** section should look exactly like what is shown below. Do NOT assign Organization (or) Group Access.



Common Data

SSN: XXXXX1111
First Name: * NOSUCH
Middle Initial: A
Last Name: * PERSON
Organization Name: * DM6105MCCDCHQCOMPPTS
Email: * noones@home.com

User Specific Data

Organization Access:

Group Access: --Organization Owner Name
 --Group Name

Non-editable Permission Level(s):
Editable Permission Level(s): * 0 1 2 3 4 5 6
Approval Override: * 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: Yes
BI Advanced Reporting Access: * Yes No
Self-AO Approval: * Yes No
User ID: ~4936745 [Reset User ID](#)

General Traveler Data

If additional access is needed, contact the installation LDTA and submit the proper DD Form 577. ODTA's are **NOT** authorized to make any additional changes in the **User Specific Data** section, specifically:

1. **Do NOT give** Organization Access; Leave it blank. **No Org Access** is OK when saving the profile. If you receive the error: Field "Organization Access has an Invalid Organization", click inside the organization access field, click "X" on the far right of the field to remove the field data, then "Save" the profile.
2. **Do NOT give** "Group Access", or assign a "Group Name"; Leave both fields.
3. **Do NOT** place a check-mark to the left of any number in the **Editable Permission Level(s)**, except zero "0".
4. **Do NOT** click "Yes" on any item with a Yes/No option.

Helpful Tip for populating a Traveler (or) User Profile

1. For Traveler profiles, ODTA's can update email address, name to match users CAC (when name change is official), General Traveler Data, Personal Data, Duty Station & GTCC Information. Avoid using special characters (* - / & @ . , #) etc., when populating addresses & unit information. If unable to update GTCC Info, contact the LDTA for assistance.
2. For Non-Traveler (User) profiles, ODTA's can update email address, name to match users CAC (when name change is official).
3. All personnel are required to receive DTS payments via electronic funds transfer (EFT). The General Traveler Data and Personal Data sections should both reflect the physical address from which the traveler commutes daily to the Permanent Duty Station (PDS)/Place of Duty (POD). DTS populates the city name from the Personal Data section when a travel indicates travel began or ended at their Residence. The same logic applies to the Duty Station and DTS must reflect the location an individual physically reports to work on a daily basis (PDS/POD).
4. These locations are used in the calculation of entitlements when travel begins/ends from either location selected.
5. For the few exceptions to the mandatory EFT payment method, the profile should be populated with a valid mailing address in the General Traveler Data section in the event a paper check needs to be sent.

Helpful Tips for adding/changing/refreshing EFT information for travelers with access to DTS. (For travelers without access to DTS, the ODTA should contact the LDTA for assistance)

Scenario 1. - Traveler does not currently have EFT information in profile (or) changes banking/financial institution*.

1. Traveler logs into DTS, clicks drop down arrow next to name in the upper right corner.
2. Select "My Profile", click on "EFT and Credit Card Accounts" link shown on left side of screen.
3. Enter either checking or savings account information (NOT BOTH), click the "SAVE" button.
*Note: Changing EFT information only affects documents created from the moment AFTER you click the "SAVE" button in step 3. Any documents in a created status will require the EFT information to be refreshed within the document itself. Follow steps 6 – 9 below, substitute Authorization/Voucher where appropriate.

Scenario 2. - Traveler receives DTS email labeled "Notice of Payment Return for Invalid EFT Account Information".

1. Traveler logs into DTS, clicks drop down arrow next to name in the upper right corner.
2. Select "My Profile", click on "EFT and Credit Card Accounts" link shown on left side of screen.
3. Enter either checking or savings account information (NOT BOTH), click the "SAVE" button.
4. Once EFT information is updated, traveler amends voucher and explains why amendment is being created, i.e. "EFT return in the amount of (\$ dollar amt). EFT information on DTS profile has been updated".
5. Traveler clicks continue, DTS creates the amendment and DTS will display the "Review Voucher" page.
6. From the Review Voucher page, click "Review Profile" (left side of document).
7. Click "Open Profile".
8. Click "EFT and Credit Card Accounts" (left side of document).
9. Click "Refresh" (shown in Blue directly above current EFT/GTCC information) which will update the voucher with EFT information resident on the main DTS profile.
10. Click on the "Financial Summary" link (left side of document) and DTS will re-calculate the voucher totals resulting in the EFT return dollar amount identified in the original email.
11. Traveler continues through normal voucher signing process.

Helpful Tip for appointing personnel to fill role(s) using the DD Form 577

The "Commander" must appoint all personnel unless such authority is delegated in writing. Refer to SecNav Instruction 5216.5 (June 2015), Chapter 2 (Keyword "Signature Authority"). Delegation of authority letters must be submitted to the LDTA along with "Assumption of Command" letters when a change in commander occurs. Personnel with delegated signature authority must have the words "By Direction" next to (or) under their printed name in block 9, prior to signing the form.

Prior to appointment, Approving Officials MUST complete the online TraX training course labeled "AO/RO – Training for Accountable Officials and Certifying Officers (Initial COL) or (Annual COL Refresher)". The course certificate is valid for 1 year: if completed on 3 Mar 2019, it expires 2 Mar 2020. The COL certificate must accompany the Approving Officials DD Form 577 when submitted to the LDTA. The AO should read the Treasury publication "Now that you're a Certifying Officer". Ref: DoDFMR Vol 5 (June 2019), Chapter 5, par 050304.A.

DD577's located on the Quantico DTS Helpdesk website have blocks 3, 6, 7 & 8 pre-populated with verbiage required by MCO 4650.39A. Additional verbiage/references may be added if local policy dictates. Contact the Quantico DTS Helpdesk prior to adding additional information to these fields. The ODTA is responsible for accurately populating data in blocks 1, 2, 4*, 5, 9, 10, 11 & 14. Dates are not required when digitally signed **BUT**, the "Appointing Authority" must appoint an individual before the "Appointee" accepts their appointment.

*Improperly populating block 4 of the DD577 can result in insufficient access to perform the intended DTS role. Too much access may unintentionally expose PII to personnel without a need to know. By default, role holders are granted permission to the organization in which their profile is resident by the LDTA, limiting PII exposure to personnel in that organization only. If that organization happens to be a sub-organization, the role holder can be given a higher level of access if their job requires it, and the DD577 properly reflects that requirement. In order to determine proper access, have a discussion with the Lead Defense Travel Administrator (LDTA) at the Quantico DTS Helpdesk that handles permissions for their unit prior to populating block 4.

The ODTA must ensure the Traveler (or) User Profile is resident in their organization prior to sending the DD577 to the LDTA to avoid a delay in permission assignment. The ODTA MUST maintain a copy of the original appointment DD577 accepted by the LDTA and used to grant permissions. The copy accepted will later be used by the ODTA when it is time to terminate/revoke the appointment. Accurate records management and file organization should be established and maintained by the ODTA. To avoid later confusion, any copy of the form not accepted should be discarded.

Helpful Tip for terminating DD Form 577's

1. Locate the copy of the original appointment DD577 accepted by the LDTA, and used to grant permissions.
2. Access the DTS profile and remove any Organization/Group Access, any number from 1-6, and change any field marked "Yes" to "No".
3. Remove the individual from all routing lists while the profile is attached to your command. Once the profile is detached, you cannot use the global Add/Remove feature, forcing you to remove the individual manually from all routing lists.
4. All blocks in section IV must be complete or the termination is improper. DFAS will not accept improperly terminated DD Form 577's. The current appointing authority can terminate the DD Form 577 if the original appointing authority is no longer with the command.
5. If the person is still with your command, it is proper for you to obtain their Electronic Signature (ELSig) or initials in block 18. Complete all other blocks in section IV and submit the termination to the LDTA.
6. If the person is no longer with your command, it would be proper to enter the words "Not Available for Signature" in block 18, Complete all other blocks in section IV and submit the termination to the LDTA.

Helpful Tips for populating routing lists

The ODTA is responsible for properly adding personnel to routing lists once permissions have been given by the LDTA. Contact the LDTA if you are new and need assistance populating and understanding this task since it can be confusing. Populate the appropriate routing lists, to include TECOM WWT, based on the role, access in block 4 of the DD Form 577 and assigned DTS permission level. TECOM WWT solely approves both authorization and voucher but their policy requires the routing list contain at least one level of traveler unit/command review. You can have multiple levels of review as you have in your normal unit/command routing lists. TECOM WWT does NOT have local vouchers populated in their routing lists because they do not fund local travel. Unit/Command AO's should be inserted as a "REVIEWER" for TECOM Authorizations/Vouchers in order to authorize/allow rental cars if/when funded by the travelers command. The stamp number should be consistent with the number currently used for AO's in the commands regular routing lists (Normally level 20 – 25).

It is recommended that commands insert their foreign clearance specialist as a level of review in routing lists. To do this, simply use the "Process Name" drop-down and select "FOREIGN TRAVEL" when adding an individual to, or updating a routing list. Selecting the stamp of "FOREIGN TRAVEL" will apply conditional routing for a document. Conditional

routing simply means that if the named condition does not exist, DTS skips that level of review within the routing list. For example, when you select the process name of “FOREIGN TRAVEL” when adding a reviewer to your routing list, DTS looks for foreign country destinations as the named condition. If the document has no foreign country locations, the document skips the level of review. This prevents your organization’s foreign travel expert (in this example) from having to review documents that do not contain foreign travel.

Please note that meeting DoD Foreign Clearance Guide requirements is mandatory for all foreign country travel requirements. Before travelers book overseas travel, they should visit the Department of State (DOS) “Travel Advisories” webpage for detailed travel advisories on foreign countries. The Department of State “Smart Traveler Enrollment Program” (STEP) makes it easy to receive alerts if a travel advisory is issued for a particular destination. It also makes it easier for the DOS to reach you in an emergency abroad. An additional reference is SECNAV M-5510.30C (24 Jan 2020).

Helpful Tip for receiving Self-Registration email notifications. Self-Registration notification emails are sent to the email address on file in the “Organization” profile. To populate a new ODTA email address, do the following.

1. Do NOT make changes to any other fields than the one listed below. If you believe they are incorrect, please consult the LDTA prior to changing.
2. Select “Organizations” under the DTA Maintenance Tool dropdown.
3. Enter the name of the Organization/Sub-Organization you wish to update, click enter.
4. Click the “Update” button.
5. Within the “Self-Registration Data” fields, enter the new ODTA’s official email address and turn “On” email notifications.
6. Save the change.