



SECRETARY OF THE ARMY
WASHINGTON

18 JAN 2017

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Army Directive 2017-05 (Secretary of the Army Policy for Travel by Department of the Army Senior Officials)

1. As the Department continues to address budgetary challenges and the preservation of the Army's resources, it is vital that our senior officials travel in a cost-effective and efficient manner and only when it is critical to mission success.
2. The enclosure to this memorandum supplements those areas of travel policy that I believe to be paramount to the proper conduct of our senior officials and conducive to the thoughtful stewardship of the American taxpayer's funds. This document supersedes Army Directive 2007-01 and is effective immediately. Its provisions apply to senior officials across all components of the Army.
3. Among the changes from previous editions, this policy addresses the use of military aircraft for administrative travel and premium-class accommodations when on temporary duty, and adds an annual reporting requirement for all instances of accompanied and unaccompanied spouse travel. I strongly encourage all Department of the Army senior officials, their legal counsel, and staff personnel to review the enclosed policy and ensure that it is implemented immediately.
4. The Administrative Assistant to the Secretary of the Army will continue to serve as my designated travel policy official. Direct any questions you may have about this policy to the Office of the Administrative Assistant, Directorate of Executive Travel.

A handwritten signature in black ink, appearing to read "Eric K. Fanning", is positioned above the printed name.

Eric K. Fanning

Encl

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**SECRETARY OF THE ARMY POLICY
FOR TRAVEL BY DEPARTMENT OF THE ARMY SENIOR OFFICIALS**

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**SECRETARY OF THE ARMY POLICY
FOR TRAVEL BY DEPARTMENT OF THE ARMY SENIOR OFFICIALS**

Department of Defense (DoD) and Department of the Army (DA) transportation resources will be managed to ensure compliance with applicable Federal laws and DoD and Army policies to prevent actual or perceived misuse. Travel must be directly and clearly related to official duties and the mission responsibilities associated with an individual's current position. Travelers must consider and document why more cost-effective alternatives (for example, video teleconferences and Web-based communications) are unable to meet official Army requirements before the expenditure of travel funds.

This document supersedes Secretary of the Army Directive 2007-01 (Policy for Travel by Department of the Army Officials), dated 25 January 2007, and is effective immediately. It implements specified policies and procedures from the Offices of the President and Secretary of Defense issued in memorandums and from Federal authorities promulgated by The Joint Travel Regulations (JTR) (Uniformed Service Members and DoD Civilian Employees); DoD Directive 4500.56 (DoD Policy on the Use of Government Aircraft and Air Travel); DoD Instruction 4500.43 (Operational Support Airlift (OSA)); and DoD Instruction 4515.13 (Air Transportation Eligibility). It also reinforces the ground transportation policies in DoDM 4500.36 (Management, Acquisition, and Use of Motor Vehicles) and Administrative Instruction 109 (Use of Motor Transportation and Scheduled DoD Shuttle Service in the Pentagon Area). This document is not intended to be a comprehensive policy on Army travel, but emphasizes supplemental direction from the Secretary of the Army for key aspects of travel. It serves to reduce the cost of travel and prevent the inappropriate—both actual and perceived—uses of DA travel resources. Accordingly, personnel must strictly comply with the terms of this policy and narrowly interpret the parameters permitting use of departmental transportation resources.

This document applies to all senior DA officials, military and civilian, in the active and reserve components when traveling on official Army business. Army officials serving in joint positions must determine whether their business is specific to the Army or the joint command. When traveling primarily in their joint command capacity, officials will refer to appropriate DoD regulations and directives and combatant command supplemental policies. When traveling primarily on Army business, commanders of Army components will refer to this policy for appropriate Service authorizations. When the policy in this directive is more restrictive than higher level Federal and/or DoD policies, this directive will apply. If this directive does not offer guidance for a specific area of travel, the higher Federal or DoD policies will apply.

The Administrative Assistant to the Secretary of the Army (AASA) is the delegated travel policy official on behalf of the Secretary of the Army and administers all changes, revisions, and exceptions to this directive. Correspondence about this directive should be sent to the Office of the Administrative Assistant to the Secretary of the Army,

U.S. Army Headquarters Services, Directorate of Executive Travel (OAA-AHS-ZT),
Building 1458, 9301 Chapek Road, Fort Belvoir, Virginia 22060.

1. **General Policy**

a. Required Use. Within DA, only the Secretary of the Army (SA) and Chief of Staff of the Army (CSA) are designated for “required use” of military aircraft (MILAIR) for air travel when on official business in an official duty status, in accordance with DoD Directive 4500.56.

(1) Required use officials must, in accordance with DoD Directive 4500.56, request MILAIR support by providing the name and title, grade, or rank of all travelers; the purpose of the travel; an itinerary including departure and arrival times; the signature of the senior traveler (which cannot be delegated); and any other special travel requirements, such as secure communications, to the Directorate of Executive Travel (OAA-AHS-ZT), which will schedule and coordinate with the servicing detachment. Required use status does not prevent the official from using commercial resources when the official determines that commercial is the most suitable method of transportation and its use will not adversely affect the mission or safety of the official.

(2) Current “required use” joint or dual-hatted Army commanders of unified commands being reassigned to positions within DA must document a mission necessity to use MILAIR for permanent change of station travel and must obtain the SA’s authorization. Service Secretary-controlled aircraft assigned to the U.S. Priority Airlift Transport Detachment will not be used for permanent change of station travel unless the SA specifically authorizes its use.

b. Senior Officials. All DA military and civilian members of any rank or grade are considered “officials” of DA. For purposes of this policy, “senior official” is defined as military O-7 and above, civilian employees in the Senior Executive Service (SES) or equivalent, and higher level employees in accordance with DoD Directive 4500.56.

c. Official Travel. Army resources will be expended only for official travel. Official travel includes (i) travel to meet mission requirements, (ii) required use travel, and (iii) other travel for the conduct of Army business.

d. Applicability. This directive primarily applies to the category of official travel known as “other travel for the conduct of Army business.” It governs official travel by Army senior officials (other than the SA and CSA) using commercial passenger carriers or Government-owned assets such as fixed- and rotary-wing aircraft. “Other official travel” includes travel to give speeches; attend conferences, meetings, or training courses; attend military ceremonies and funeral services; make routine site visits; and conduct other similar Army business. Justification for this type of travel, whether via commercial carrier or MILAIR, requires documentation showing the benefit of the travel to the Army and that the purpose of the travel cannot be accomplished by a less expensive alternative, such as videoconference or Web-based communication.

e. Stewardship. All MILAIR users, including those officials designated as “required use,” are reminded that DoD Directive 4500.56 requires every effort to be made to minimize the cost and size of aircraft necessary to satisfy the mission requirement. Further, the SA retains the authority from DoD to make the policy on the use of MILAIR more stringent. Requests for the use of MILAIR will address all applicable DoD regulations and instructions requiring the most cost-effective use of those assets.

(1) Justification for the use of fixed-wing MILAIR for “other official travel” requires documentation showing that MILAIR, as opposed to commercial air transportation, is essential for the conduct of Army business.

(2) Justification for the use of rotary-wing aircraft for “other official travel” requires documentation showing that MILAIR, as opposed to ground and commercial air transportation, is essential for the conduct of Army business.

f. Requests for MILAIR. DA activities supported by the Directorate of Executive Travel will submit requests for validation no later than 7 working days before the travel is scheduled to begin or the directorate may return the request without action. Requesters for MILAIR support are encouraged to submit requests earlier than 7 working days before the start of the travel to maximize the availability of aircraft and scheduling options. Under no circumstances will a MILAIR flight be formally scheduled without the senior traveler’s signature (actual or digital) included on the appropriate request form. Further, the documented senior traveler must be onboard the requested aircraft or the scheduling agency may cancel the mission.

g. Approval Authority. In accordance with Office of Management and Budget Circular No. A-126 Revised (Improving the Management and Use of Government Aircraft) and DoD Directive 4500.56, the use of MILAIR by Army officials must be approved at least one organizational level higher than the requester, except for officials designated as “required users.” Only “required users” may authorize their own use of MILAIR and then only if it is for official travel.

(1) Headquarters, DA (HQDA). All requests by HQDA officials, regardless of rank or grade, for travel via MILAIR must be submitted through the Directorate of Executive Travel to the AASA for validation, authorization, and scheduling. The AASA ensures that sufficient key personnel are in the National Capital Region (NCR) to conduct departmental business and approves the simultaneous absences of senior officials and their principal deputies. The AASA is the approval authority for all official travel via MILAIR outside the NCR, including for the following Secretariat officials: Under Secretary of the Army; Assistant Secretaries of the Army; General Counsel; Deputy Under Secretary of the Army; Chief Information Officer/G-6; The Inspector General; The Auditor General; Chief, Legislative Liaison; Director, Small Business Programs; Chief, Public Affairs; Chairman, Army Reserve Forces Policy Committee; and the senior military official in each Army Staff agency.

(2) National Guard Bureau Authority Under Title 32, U.S. Code. The Chief, National Guard Bureau is responsible for establishing and implementing procedures to

properly control official travel within the Bureau and for State and Territorial Adjutants General.

h. Agency Representative at Funerals, Retirements, and Changes of Command. Generally, travel to serve as the Army's official representative at funerals, retirements, and change of command ceremonies, where ground travel is not suitable because of distance, is considered an official event only for the senior military and/or civilian official formally representing DA. In some cases, the senior official may be accompanied by an aide, command sergeant major (or similar position), or other essential personnel when the senior official documents the necessity for the participation of additional personnel. Manifests of official passengers will include only those personnel necessary to provide official DA representation, in addition to those personnel officially assigned to perform funeral detail duties. All other accompanying travelers who are not formally participating in the event, including other senior officials and Family members, are traveling in an unofficial and personal capacity. Accordingly, they may only accompany the official traveler on MILAIR on a reimbursable and noninterference basis. A larger aircraft will not be scheduled to accommodate such personnel, and unofficial travelers must pay the coach fare, regardless of whether the aircraft would otherwise have empty seats.

i. Controls. Commands are responsible for evaluating controls over travel during internal control reviews required by Army Regulation (AR) 11-2 (Managers' Internal Control Program). Further, controls over travel will continue to be an item of special interest during Inspector General and U.S. Army Audit Agency inspections, audits, and reviews.

2. Travel Outside the Continental United States

a. Overseas Travel. Special emphasis must be given to controlling and monitoring overseas travel (including overseas travel by students of professional military schools), reducing the number of personnel traveling to the same site, and decreasing the number of travel days for each trip.

(1) Overseas travel, initiated both within the continental United States (CONUS) and outside CONUS (OCONUS), should be undertaken only when the need is absolutely clear and then only by the smallest group possible consistent with mission requirements. Back-to-back trips by different officials to the same location(s) are strongly discouraged, and trips should be actively coordinated to prevent that situation. The routine method of travel from CONUS to OCONUS locations will be by commercial air for all travelers not in a "required use" status. In-theater MILAIR may be authorized when in accordance with procedures for operational support airlift. Normally, in-theater support requires a completed DD Form 2768 (Military Air Passenger/Cargo List), including the signatures of the senior traveler and authorizing official. The requesting organization is responsible for coordinating with OCONUS MILAIR scheduling authorities.

(2) U.S. Air Force Air Mobility Command or Air Mobility Command-contracted airlift must be used for overseas travel when it is available and meets the mission requirements for permanent change of station or temporary duty (TDY) travel.

b. Meetings With Foreign Dignitaries. All OCONUS travel by DA and CONUS-based personnel where the traveler will meet directly with officials of foreign governments must be coordinated with the Office of the Deputy Secretary of Defense through the Office of the SA. Travel requests for Secretariat officials must be submitted through the AASA to the SA for review and initial approval before submission to the Office of the Deputy Secretary of Defense. The CSA is delegated authority for initial review and approval of travel by Army Staff, Army Command (ACOM), Army Service Component Command (ASCC), and Direct Reporting Unit (DRU) officials. The CSA may redelegate this authority, but no lower than a three-star general officer or civilian equivalent. Travel requests the CSA or designee has reviewed and initially approved must then be forwarded through the AASA to the SA before submission to the Office of the Deputy Secretary of Defense. All requests for foreign travel should be submitted before discussion of travel plans with the foreign government concerned.

c. Clearances. DA and CONUS-based personnel must follow the guidance in paragraph eight and the corresponding country pages of the DoD Foreign Clearance Guide (<https://www.fcg.pentagon.mil/fcg.cfm>) to obtain country clearance for all foreign travel. The leadtime for requesting personnel clearances is approximately 35 to 45 days.

d. Official Foreign Travel. The Executive Secretary to the Secretary of Defense acts as liaison between DA and the Assistant to the President for National Security Affairs on all official foreign travel. Requests for official foreign travel proposals for officials at or above the rank of Assistant Secretary (or equivalent rank, including the Service Chiefs and Vice Chiefs) of executive departments and agencies are to be submitted to the Assistant to the President for National Security Affairs through the Executive Secretary. Such notifications are to be coordinated with the Under Secretary of Defense for Policy. Requests should be forwarded to the Executive Secretary under cover of an action memorandum requesting signature and forwarding to the National Security Council. All requests should be forwarded to the Executive Secretary at least 10 days in advance of the intended travel. Here is an example of a properly prepared request for the Executive Secretary's signature:

<OSD LETTERHEAD>

MEMORANDUM FOR NATIONAL SECURITY ADVISOR

SUBJECT: Request Approval of Foreign Travel

Senior Official and Title: The Honorable (Principal Name/Title or Deputy Principal Name/Title)

Purpose of Travel: The purpose of this trip is to hold discussions with foreign military counterparts, and senior U.S. military and civilian officials on administrative matters of mutual interest.

Itinerary:

Date	City	Country	Major Event/Meeting
10 Aug 2014	Andrews AFB	USA	Departure
11 Aug 2014	Naples	Italy	Refuel Stop
11 Aug 2014	Tbilisi	Georgia	Meeting
12 Aug 2014	Tbilisi	Georgia	Departure
12 Aug 2014	Abu Dhabi	UAE	Meeting
13 Aug 2014	Abu Dhabi	UAE	Departure
13 Aug 2014	Brussels	Belgium	Arrival
13 Aug 2014	Brussels	Belgium	Departure
14 Aug 2014	Andrews AFB	USA	Arrival

Michael L. Bruhn
Executive Secretary

NSC Approval _____

e. International Conferences. Any DA or CONUS-based officials approved by the appropriate conference approval authority and traveling to an OCONUS international conference¹ must submit a preliminary report of travel through the AASA to the SA for submission to the U.S. Department of State, Office of International Conferences, Bureau of International Organization Affairs. The officials must submit a final report through the AASA to the SA for submission to the Office of International Conferences within 30 days after the travel ends (see samples at enclosure 1). DA personnel need not report travel undertaken to carry out intelligence or intelligence-related activity, a protective function, or a sensitive diplomatic mission. Preliminary and final reports for Army Secretariat and Army Staff officials must be submitted through the AASA to the SA for review and initial approval before submission. Contact information for the Office of International Conferences is:

¹ For this purpose, an international conference is defined as any meeting held under the auspices of an international organization or foreign government at which representatives of more than two foreign governments are expected to attend and to which U.S. executive agencies will send 10 or more representatives.

Office of International Conferences, Bureau of International Organization Affairs,
U.S. Department of State

Director: 202-647-6875

Office Management Specialist: 202-647-8336

f. Force Protection. Planning force protection must be an integral part of travel planning, particularly for OCONUS travel. The following guidelines must be followed for all senior official MILAIR travel:

(1) The senior U.S. Army general officer or civilian equivalent onboard an aircraft is responsible for planning and approving all itineraries when traveling OCONUS.

(2) The senior traveler must personally review all itineraries, including en route refueling stops.

(3) The senior traveler must make deliberate decisions to ensure that adequate security arrangements are in place at refueling locations or layovers before arrival.

(4) A scheduled refueling stop at a civilian/non-U.S. military facility requires the approval of the senior U.S. Army general officer or civilian on board the aircraft, in coordination with the flight commander. No stops at civilian activities where the force protection condition exceeds ALPHA are permitted unless the senior U.S. Army general officer or civilian on board the flight, in coordination with the flight commander, agrees to the stop.

(5) U.S. Army Criminal Investigation Command may assist in planning and coordinating travel security for all high-risk personnel. Criminal Investigation Command conducts vulnerability assessments for personal security that can be a valuable tool in gauging the thoroughness of procedures for planning travel security for high-risk personnel. A limited scope vulnerability assessment focused on travel security planning can help identify weaknesses, recommend measures to correct the weaknesses, assist in determining levels of protection appropriate to the threat, and facilitate coordination of security resources while in a travel status.

3. Commercial Air Travel

a. Contract Fares and Carriers. Army officials who are not designated as “required users” must consider the use of commercial passenger carriers. MILAIR will be requested only if it is determined that commercial carriers cannot support official Army requirements. Commercial air travel must be conducted using contract fares via a contracted commercial travel office. “City Pair” fares must be used at all times, unless specific criteria in JTR, Appendix P (City Pair Program) can be met. “City Pair” fares represent “best overall value,” not necessarily lowest fare; therefore factors beyond just the ticket cost to the Government must be considered before booking any transportation with a noncontract carrier. Considerations should include total time of travel; time lost

because of layovers; work time lost to the Government, including travel compensatory time; and similar cost-increasing factors. Exceptions that would permit the use of a noncontract carrier must be clearly specified on the individual's travel order/ authorization. Travelers may use noncontract fares under these circumstances:

(1) Space on a scheduled contract flight is not available in time to accomplish the purpose of the travel, or use of the contract service would require the traveler to incur unnecessary overnight lodging costs that would increase the total cost of the trip.

(2) The contract carrier's flight schedule is inconsistent with explicit policies of individual Federal departments and agencies to schedule travel during normal working hours.

(3) A noncontract (DoD approved) carrier offers a lower fare available to the general public, the use of which results in a lower overall trip cost to the Government. The evaluation of overall trip cost must include a consideration of the combined costs of transportation, lodging, meals, and related expenses. *Note: This exception does not apply if the contract carrier offers a comparable fare and has seats available at that fare, or if the lower fare a noncontract carrier offers is limited to Government and military travelers on official business and may be purchased only with a Government procurement document (such as a Government transportation request), contractor-issued charge card, or centrally billed account. These fares, referred to as "me too" fares, will not be used in lieu of contracted fares.*

(4) Rail service is available and that service is cost-effective and consistent with mission requirements.

b. Economy-/Coach-Class. The primary mode of transportation Army personnel use for official travel is commercial economy-/coach-class. In all cases, other than economy-/coach-class (OTECC) travel must be treated as an exception to policy and approved only by authorized officials, as stated in paragraph 3d beginning on page 11. *Note: Any class of service, regardless of name (such as economy plus, business, executive class, coach plus, and so on) that exceeds the cost of or resides outside the coach-class cabin must be treated as OTECC travel and must be approved in accordance with the policies in paragraph 3c. Generally, the local commercial travel office can help personnel understand which fares are acceptable without additional approval.*

c. Other Than Economy-/Coach-Class. Blanket approval of OTECC air travel for any DoD officials, military or civilian, is not authorized. All official travelers, regardless of rank or grade, must provide a written justification for each request for the use of OTECC travel. The justification must explain why correspondence, teleconference, or other appropriate means cannot accomplish the Army's official purpose. In every case, individual travel orders/authorizations must include a statement that clearly identifies the appropriate citation(s) (JTR paragraph 3520) and clearly provides full justification for the use of OTECC travel. Travel orders/authorizations that do not include the specific citations from the JTR will be returned without approval.

(1) In addition, the traveler's statements on the travel order/authorization must identify the actual cost increase to the Government for the use of OTECC travel and specify why bulkhead or standard coach-class seating cannot be used in lieu of the more expensive accommodations. Round-trip authorizations will not be approved unless each leg of travel qualifies independently of one another; that is, both outbound and return trips must qualify on their own merits.

(2) The OTECC authorizing/approving official for each traveler (specified in paragraph 3d) may authorize use of OTECC (less than first class) commercial travel only when the required statements have been properly added to each travel order/authorization and the traveler is in complete compliance with one or more of the exceptions in the JTR. Additionally, the OTECC checklist must be used and submitted as part of the approval documentation.² The approving official must certify that he/she considered all decision factors and other alternatives before recommending approval.

(3) A summary of the current JTR exceptions follows but this information is subject to frequent change. Travelers must use the appropriate citations from the JTR when completing their orders/authorizations and therefore should refer to JTR paragraph 3520 to make sure they include the correct information. (Failure to receive the appropriate authorization/approval for OTECC transportation either before or after travel may result in the traveler being financially liable for costs in excess of the economy-/coach-class airfare.) Exceptions are:

- regularly scheduled flights along the route provide only OTECC seats.
- no space is available in economy/coach in time to accomplish the official purpose/mission of the travel, and the purpose/mission is so urgent it cannot be postponed.
- need to accommodate a traveler's disability or other physical impairment, substantiated in accordance with the following procedures.

(a) Military travelers must provide medical documentation using the format at enclosure 2. For each instance of OTECC travel based on a medical condition or disability, the physician's statement must be dated within 6 months of the travel for temporary conditions and within 24 months for conditions declared permanent. In the statement, the physician must state that OTECC accommodations are required and specifically address whether coach-class bulkhead and exit row seating and/or two adjacent seats in coach class will address the traveler's needs. In cases where commercial carriers charge additional fees for bulkhead and exit row seating, OTECC authorization is required. Blanket approval for OTECC travel based on medical condition or disability is prohibited.

(b) Civilian travelers must request a reasonable accommodation in accordance with the Army's procedures for providing reasonable accommodation for individuals

² The OTECC checklist is available on the Defense Travel Management Office Web site at <http://www.defensetravel.dod.mil/Docs/Other-than-Economy-Class-Checklist.pdf>.

with disabilities. (The policy and information is available at <https://www.opm.gov/policy-data-oversight/disability-employment/reasonable-accommodations/>.) Civilian travelers may be required to provide medical documentation supporting their request. Upon receipt of a request, supervisors should consult with their servicing legal office. Supervisors should consider whether less expensive modes of transportation or means of accomplishing the purpose of the travel will effectively accommodate the traveler's disability.

Note: Bulkhead seating is commonly the first row of commercial coach-class seating behind the aircraft's bulkhead and, depending on the airframe, generally provides additional legroom. Exit row seating often offers similar legroom to commercial business class seating but slightly less overhead storage. Depending on the severity of the disability, these unique economy-/coach-class accommodations can often replace the need for OTECC seating at less cost. Availability of either of these accommodations should be considered before requesting or approving dual coach or OTECC seating and should be addressed by the physician providing the medical documentation. Outside of a documented severe medical condition, OTECC accommodations may not be authorized between CONUS locations.

- travel on a foreign flag carrier has been approved by the normal authorizing/order-issuing official in accordance with the Fly America Act and the JTR, and the sanitation or health standards in coach are inadequate, as determined by the U.S. Department of State or DoD.
- overall savings to the Government result by avoiding additional subsistence costs, overtime, or lost productive time that would be incurred while waiting for available coach seats. (A cost comparison must be stated on the authorization/order.)
- travel costs are paid by a non-Federal source.
- travel is direct between authorized origin and destination points (one of which is OCONUS), which are separated by several time zones, AND the scheduled flight time exceeds 14 hours (including stopovers between flights), AND the mission was so unexpected and urgent it cannot be delayed, AND the traveler must conduct official business immediately upon arrival without enough time for a "rest period," AND justification exists for not leaving earlier to accommodate a rest upon arrival.

Note 1: If the stopover is an overnight stay, that stop disqualifies the traveler from using business class. A rest stop en route is prohibited when travel is authorized in OTECC (less than first class) accommodations. When this authority is exercised, a traveler is not authorized a rest period upon arrival at the duty station. The traveler is, however, permitted a short, reasonable time to check into a hotel and freshen up if necessary. This justification must not be used in lieu of scheduling coach-class accommodations that allow for authorized rest stops en route or upon arrival at the destination. When returning from TDY, OTECC (less than first class) travel will not be authorized simply

because the total flight time (including stopover) exceeds 14 hours or the traveler wants to arrive in time to meet routine office responsibilities (that is, staff meetings or events the traveler scheduled that he/she can easily change to accommodate a proper rest). Authorized upgrade of return flights to the permanent duty station will be considered only under extremely rare circumstances.

Note 2: For the purpose of this policy, a “reasonable” time to check into the hotel and “freshen up” is defined as an opportunity immediately upon arrival to change clothes and/or check into housing accommodations. It does not include time for sleeping or lengthy delay upon arrival before the start of official duties.

Note 3: The authorizing official must state on the authorization/order (i) when the TDY travel was identified, (ii) when the travel reservations were made, and (iii) the cost difference between economy-/coach-class and business class or first class (as appropriate).

- security concerns exist that make such travel essential to the successful performance of the mission.

d. Authorizing/Approving Officials for OTECC Transportation. In accordance with DoD Directive 4500.09E (Transportation and Traffic Management), the AASA is the authorizing/approving authority for requests for OTECC (less than first class) transportation for HQDA officials. Requests by Army Secretariat and Army Staff officials must be submitted through the Directorate of Executive Travel (OAA-AHS-ZT) to the AASA. A list of officials who are authorized to approve the OTECC travel of their subordinate officials is in paragraph 3d(3). These officials are responsible for ensuring that all applicable policies are strictly followed and compliance with reporting procedures is strictly enforced. Other commanders will process requests through the Directorate of Executive Travel to the AASA. In accordance with JTR paragraph 2110, no official, regardless of rank or position, may approve his/her own use of OTECC transportation. The approving official must keep all documentation, including justifications, approval signatures, and similar paperwork, for at least 2 years.

(1) All requests for OTECC travel by retirees/separatees traveling on official DoD business or permanent change of station will be processed to and authorized by the retiree's/separatee's former three- or four-star command, ACOM, ASCC, or DRU. The AASA will approve the travel request if the former unit is not commanded by a three- or four-star commander.

(2) In very rare instances, the cost of OTECC accommodations may be less than the cost of economy/coach. In those instances, officials may book the upgrades without additional approval. It is highly recommended that officials retain complete documentation and recognize that travel outside coach-class seating may result in the public's incorrect perception of abuse.

(3) In addition to the SA, CSA, Under Secretary of the Army, Vice Chief of Staff of the Army, and AASA, the following positions within DA are authorized to approve

OTECC (less than first class) requests from subordinate officials within their commands. This authorization may be delegated in writing to a two- or three-star general officer/member of the SES. Further delegation is prohibited. Each command is responsible for notifying its subordinate elements and local servicing commercial travel offices of the names and positions of those officials formally delegated this authority and for implementing the required reporting procedures indicated in paragraph 3f on page 13:

- Commander, U.S. Army Forces Command
- Commander, U.S. Army Training and Doctrine Command
- Commander, U.S. Army Materiel Command
- Commander, U.S. Forces Korea
- Commander, U.S. Army Pacific
- Commander, U.S. Army Europe
- Commander, U.S. Army Central (Third Army)
- Commander, U.S. Army North (Fifth Army)
- Commander, U.S. Army Special Operations Command
- Commander, U.S. Army Space and Missile Defense Command/Army Strategic Command
- Commander, U.S. Army Cyber Command
- Commander, U.S. Army Medical Command
- Commander, U.S. Army Intelligence and Security Command
- Commander, U.S. Army Corps of Engineers
- Commander, U.S. Army Installation Management Command
- Superintendent, United States Military Academy
- Commander, Second Army

HQDA senior officials and Army officials not under the command of a three- or four-star commander of an ACOM, an ASCC, or a DRU must process OTECC travel requests through the Director of Executive Travel to the AASA.

(4) All requests for OTECC travel must be submitted at least 10 working days before the travel date. Requests submitted without enough processing time may be returned without action.

e. First Class. Within DA, the SA is the authorizing/approving authority for first class travel paid by Government funds or a non-Federal source pursuant to 31 U.S. Code (U.S.C.) § 1353. The SA has delegated authority to the Under Secretary of the Army to approve first class requests with no further delegation permitted. All requests for the use of first class travel must be fully justified under the appropriate provision of the JTR and submitted through the Directorate of Executive Travel (OAA-AHS-ZT) through the AASA to the SA for approval. In very rare instances when the cost of business and/or first class accommodations is less than the cost of economy/coach, the official may book those accommodations without higher authority, but must retain complete documentation that clearly shows the cost savings to the Government.

f. Reporting Requirement. The Under Secretary of Defense (Personnel and Readiness) has directed that the Military Services and Defense Agencies enter all approved OTECC travel into the Web-based OTECC Travel Reporting Tool within 5 business days of approval. The Web-based tool replaced the semiannual reporting requirement and automatically consolidates OTECC input at each successive command level.

(1) To access the tool, the primary and alternate reporting office point of contact (POC) for each authorizing official (listed in paragraph 3d) must complete a one-time registration on the Web site at www.defensetravel.dod.mil/passport/. The primary and alternate POC should be appointed from the approving official's headquarters or personnel with direct visibility of OTECC approvals, such as the budget or resource office. Once the registration is accepted, the reporting office POCs will receive a username and password via email. Any authorized member from the reporting office may use this same username and password.

(2) The reporting office POC is required to enter each occurrence of approved OTECC travel into the OTECC Reporting Tool within 5 business days of approval. Each authorizing/approving official is responsible for establishing and implementing procedures to ensure that their reporting office receives and reports all incidents of OTECC travel approved within their command and subordinate commands. Under no circumstances may an instance of OTECC travel authorization go unreported.

(3) Failure to receive the appropriate authorization/approval for OTECC travel either before or after the travel may result in the traveler being financially liable for costs in excess of the economy-/coach-class airfare.

(4) The following data elements are reported in the OTECC Reporting Tool:

Data Element	Codes
Basic ID	U.S. General Services Administration
Name	Purpose of Travel Codes
Grade	1 Mission (Operational)
Last 4 Social Security Number	2 Training
	3 Conference
	4 Relocation
Unit ID	5 Special Agency Mission
Service	6 Emergency Travel
Organization	
Transportation Mode	
0 = Air	
1 = Ship	
2 = Train	
Purpose of Travel	First Class Justification Codes
(Use JTR, Appendix H Codes)	F1 Lower class not available in time
Origin (City, State)	F2 Medical
Destination (City, State)	F3 Security
	F4 Mission
	F5 Only first class provided
	F6 Non-Federal source
	FC Congressional travel
Beginning Date of Travel	Business Class Justification Codes
	B1 Medical
Fare Paid	B2 Security
	B3 Foreign flag coach not adequate
Coach Fare	B4 Only business class provided
	B5 Non-Federal source
	B6 Over 14 hours
Ticket Issuing Location	B7 Overall savings
	B8 Lower class not available in time
Justification (Use codes, not text)	

Data Element	Codes
	B9 Mission
Approval Authority	BC Congressional Travel
	BF Required by Foreign Government Regulations, MOU/MOA/SOFA

g. Uniform Wear. Because of the possible misperception of abuse when travel in premium class accommodations has been authorized, senior military and civilian officials should refrain from wearing uniforms and publicly discussing their position with the Government while in those accommodations, unless highly unusual circumstances exist where travel in uniform cannot be avoided. This policy is not intended to conflict with, overrule, or otherwise supplement any uniform rules or regulations, and all military members must refer to appropriate and current uniform policies before official travel. Further, this policy does not apply to nor is intended to restrict Soldiers from accepting offered on-the-spot upgrades that result in no additional cost to the Government. (“On-the-spot” upgrades are defined as no-cost upgrades to premium class accommodations that the airline offers at boarding without the request or initiation of the service member or employee.)

h. Actual Expense Authority (AEA). The authorization of AEA over approved per diem rates must be restricted to circumstances where the success of the mission is negatively affected if AEA is not authorized. AEA must never be authorized solely for the convenience or comfort of the official. Authorization of AEA will not be automatically applied simply because an official business event is being held at a commercial hotel where no rooms are available at the per diem rate. A significant justification why other hotels in the commuting area cannot be used to remain within per diem must accompany requests for AEA. AEA from 1–300 percent over per diem must be approved one organizational level higher than the requester. Within HQDA, the AASA is the approval authority for AEA from 1–300 percent over per diem. AEA over 300 percent will not be approved.

4. Gratuities (Including Frequent Flyer Miles) Received From Commercial Sources

a. General. Army travelers may keep for personal use any promotional material, including frequent traveler benefits (frequent flyer miles, and hotel and rental car points), they earn on official business at agency expense. The promotional material must be obtained under the same terms as those offered to the general public and must be at no additional cost to the Government. The use of noncontract carriers solely to gain frequent traveler miles or other benefits is strictly prohibited.

b. Upgrades to Premium Class. Travelers may use frequent flyer miles earned during official travel to upgrade official or personal flights to business or first class accommodations without additional authorization.

Note: An Army traveler must not deliberately delay a return from TDY or increase mission cost to the Government to take advantage of offered commercial travel benefits or for personal convenience. A traveler may only delay a return from TDY if the delay does not affect an Army mission (that is, a delay from a Saturday to Sunday return when both days are scheduled nonduty days for the traveler and the traveler is on an approved pass or leave) AND the delay does not increase the cost to the Government.

c. On-the-Spot Upgrades. Soldiers who are offered on-the-spot upgrades (over coach fares) without cost to the Government may accept the upgrade and travel while in uniform provided that the airline made the offer without the Soldier's initiation. In all cases, current Army uniform wear policies apply and should be reviewed before travel. This document is not intended to conflict with or otherwise supersede uniform wear requirements. In cases of possible conflict, officials must defer to the more specific uniform policies.

5. Travel on General Military Aircraft

a. General. Army officials who are not "required users" should perform official travel using commercial passenger carriers unless specific conditions exist. Generally, when commercial air transportation is available to effectively fulfill the mission requirement and meet the traveler's departure and/or arrival requirements within a 24-hour period, MILAIR will not be used. However, MILAIR may be authorized when any one of the following conditions is met:

(1) The actual cost of using MILAIR is less than the cost of using commercial air service.

Note: Only a scheduling authority can properly determine the cost-effectiveness of a MILAIR flight. Therefore, although it may be appropriate to request MILAIR when commercial air is reasonably available, it will not be scheduled unless that scheduling authority performs a cost analysis in accordance with Office of Management and Budget Circular No. A-126 Revised.

(2) Commercial air service is unacceptable because:

- highly unusual circumstances present a clear and present danger to the official traveler.
- an emergency exists.
- other compelling operational considerations outside the control of the senior traveler make commercial transportation unacceptable.

(3) The aircraft was previously scheduled to perform a bona fide training mission, the minimum mission requirements are not exceeded, and the Government will incur no additional cost. MILAIR must not be scheduled for training missions for the primary purpose of accommodating the travel of DA military or civilian personnel. The servicing detachment must keep documentation showing that a training mission was previously scheduled.

b. Scheduling. When scheduling MILAIR, every effort will be made to avoid:

(1) trips between major U.S. cities. It may be difficult to justify the use of MILAIR for travel along high-density routes (for example, Washington, DC, to New York City, Atlanta, Los Angeles, or Chicago) because:

- commercial travel is generally less expensive to major hub cities.
- high-density traffic may make it difficult to obtain desired arrival or departure times.
- travelers must be cognizant of the public's perception of the use of MILAIR resources.

(2) trips where the aircraft appears to be filled with personal staff members to make the trip cost-effective.

(3) trips requested because of the need to accommodate competing requirements, especially when either requirement is an event of a social nature. For example, a meeting or other similar event that can be satisfied via remote means must not be scheduled to accommodate the desire to attend a change-of-command ceremony where the traveler would otherwise be in an unofficial role.

(4) trips that require repositioning of MILAIR between proximity airfields, except for the SA and CSA. A proximity airfield is one that serves the same general geographic area as another facility and lies within 60 miles of the primary airfield. Examples of proximity airfields include Joint Base Andrews and Davison Army Airfield in the Washington, DC, metropolitan area, and Kansas City International and Sherman Army Airfield in the greater Kansas City, Kansas-Missouri, metropolitan area. In addition, MILAIR flights must adhere to the "one aircraft, one crew" principle, and the travel schedule must be altered to fit within a crew duty day.

c. Type of Aircraft. The particular aircraft used must be the least costly aircraft capable of satisfying the mission requirements in accordance with Office of Management and Budget Circular No. A-126 Revised and DoD Directive 4500.56. Larger aircraft can be used only for reasons of safety, security, or economic feasibility. At no time will a larger aircraft be scheduled to accommodate individuals traveling in a "noninterference" or unofficial status, or according to their rank, grade, or protocol code. The scheduling of two aircraft where the second aircraft is for the primary purpose of acting as a backup in the event of the loss of the primary aircraft is prohibited.

Missions requiring more than one crew or exceeding detachment “crew hour” policies are prohibited. Commercial air transportation will not be requested or scheduled for DoD group travel (defined for this purpose as 10 or more seats) unless all actions to obtain MILAIR transportation have been terminated. DoD travelers and Government entities will practice the prudent use of all modes of commercial transportation to enable DoD to continue to access low-cost commercial travel. The presence of a spouse must not be considered in the requirement for a larger aircraft.

d. Approval Authority. See paragraph 1g on page 3.

e. Use. The use of commercial airlift to OCONUS destinations does not prevent the use of MILAIR in an OCONUS theater of operation when:

(1) MILAIR is reasonably available and does not require “deadhead” (empty) flights to begin or end the mission.

(2) U.S. commercial carriers are not available and significant security concerns prevent the use of foreign flag carriers.

f. Request for MILAIR Travel. All requests to use fixed- and rotary-wing MILAIR for “other official travel” must be in writing. Requests by other than DoD senior officials are processed for approval through existing standard procedures. Travel approval authorities may establish the specific format for requests and documentation of MILAIR travel. At a minimum, however, this documentation must meet the requirements of DoD Directive 4500.56.

(1) Requesters must determine and document that the requirements in this directive’s policies for the use of fixed- and rotary-wing aircraft have been met for each individual use.

(2) The senior traveler must sign all requests for MILAIR travel. Signature authority may not be delegated.

g. Delegation of Approval Authority for Selected Foreign and U.S. Travelers on MILAIR. Under the provisions of DoD Instruction 4515.13, paragraph 12.3, table 4, the Director of the Army Staff; CONUS ACOM, ASCC, and DRU commanders; and heads of Army activities in the grade of major general or above are delegated the authority to approve the following categories of passengers for travel in CONUS on MILAIR when such travel is in direct support of the approving command or activity:

(1) foreign military personnel who possess proper authorization for installation visitation.

(2) foreign civilians assigned to Headquarters, North Atlantic Treaty Organization who possess authorization for installation visitation.

(3) U.S. citizens, except for non-DoD Federal officials and their spouses, and Members of Congress and their staffs. The approval for accompanying spouse travel for DA personnel remains unchanged and will comply with paragraph 10, beginning on page 23. This authority may not be further delegated.

h. Contractors Aboard MILAIR

(1) Generally, contractors must not be placed on MILAIR except in compliance with DoD Instruction 4515.13, paragraph 3.6(k). When the success of an Army mission depends on the presence of contract personnel, those personnel may be placed on MILAIR through the use of a contractor identification memorandum/letter of authorization (a sample is at enclosure 3). Use of an invitational travel authorization to place contractors on MILAIR is prohibited. The contractor identification memorandum/letter of authorization must include:

- name, Social Security number, company name and DoD contract number.
- billing address of contractor for purposes of billing costs if travel is to be approved under the authority of DoD Instruction 4515.13, paragraph 3.6(k)(1)(b), or the appropriation to be charged (fund cite or responsible DoD contract number to be charged) if travel is to be approved under the authority of DoD Instruction 4515.13, paragraph 3.6(k)(1).
- justification and purpose for being onboard the aircraft.
- statement indicating that commercial transportation is not available.
- signature of senior Army official requesting the contractor's presence.

(2) Approved contractors on board MILAIR and operating under contracts where commercial transportation costs have been included in the contract must reimburse the Government at full commercial coach fare within 5 days of completion of the travel. Under no circumstances may contractors travel or be reimbursed using the contract fares offered to Government employees.

(3) The contractor identification memorandum/letter of authorization must be submitted through normal travel authorization channels and, if applicable, processed with required documents through appropriate local billing channels to ensure timely reimbursement to the U.S. Treasury.

6. **Travel on Rotary-Wing Military Aircraft**

a. General. Administrative use of rotary-wing MILAIR will occur only when the use of ground transportation would have a significant adverse effect on the ability of the senior official to effectively accomplish the purpose of the official travel. Generally, space available (Space-A) passengers will not be cleared for travel on rotary

wing aircraft. (For additional information, see paragraphs 6g(3) and 9 on pages 21 and 23, respectively.)

b. Applicability. This policy does not apply to “operational mission” use of rotary-wing aircraft as defined in AR 95-1 (Flight Regulations), or to mission-required use such as the transport of troops or equipment, training, evacuation (including medical evacuation), intelligence and counternarcotics activities, search and rescue, transportation of prisoners, use of defense attaché-controlled aircraft, aeronautical research, space and science applications, exercising command or supervisory authority at adjacent or local installations, and other such activities.

c. Commercial Service. If commercial aircraft service is available between the general departure and destination locations, the criteria in paragraph 5a must also be satisfied.

d. Alternatives. Helicopter travel to events that can be accomplished by video teleconference, or combined with other events and activities, will not be approved.

e. Intracity Travel. Helicopter assets must not be used for transportation between installations within the NCR except in unusual circumstances. Helicopters will not be used to transport between the Pentagon and Joint Base Andrews or Davison Army Airfield. The SA determines the existence of unusual circumstances within the NCR.

(1) Intracity travel is travel that departs from and arrives at any location within the Greater Washington-Baltimore metropolitan area.

(2) Intracity travel is limited to code 1, 2, and 3 civilians and code 2 and 3 general officers.

(3) The AASA must approve all requests for exceptions for HQDA officials.

f. NCR Support. Within the NCR, all approved requests for helicopter support are forwarded from the respective organizational airlift validator to the 12th Aviation Battalion, Fort Belvoir, Virginia.

g. Pentagon Helipad. The following guidance applies to use of the Pentagon helipad:

(1) Eligibility for use of the Pentagon helipad is restricted to protocol code 4 civilians, lieutenant generals, and above. Code 5 civilians, major generals, and lower will use Davison Army Airfield, Fort Belvoir, Virginia, or Fort McNair. (See enclosure 4 for estimated distances and flight times and enclosure 5 for VIP code definitions.)

(2) The Pentagon helipad is normally available Monday through Friday from 0730 to 1730. Exceptions for use of the Pentagon helipad outside these hours may be granted only for tier 1 and 2 officials, as indicated in DoD Directive 4500.56, and under the most extraordinary circumstances. Exceptions for tier 2 officials will be coordinated

with the Directorate of Executive Travel and clearly justify why proximity airfields (Fort McNair, Davison Army Airfield, or Joint Base Andrews) are unsuitable for completion of the mission in lieu of overtime costs. The Directorate of Executive Travel will coordinate all exceptions with the 12th Aviation Battalion.

(3) The Pentagon helipad and Army aircraft using the Pentagon helipad will not accept Space-A passengers.

7. Use of Executive Aircraft

a. General. Within CONUS, executive aircraft are specially configured aircraft assigned to the U.S. Air Force's 89th Airlift Wing and Service Secretary-controlled aircraft designated by the Secretary of the Army and Secretary of the Navy. Executive aircraft are used to support "required use" officials when other airlift does not provide the timeliness, security, or communications capability required. Depending on the type of aircraft, the costs associated with operating this limited inventory of aircraft are from about \$5,000 to more than \$12,000 an hour. Consequently, use of these assets is restricted to only those officials DoD Directive 4500.56 identifies as tier 1 and 2 travelers or those the Service Secretaries designate. The Executive Secretary to the Secretary of Defense must approve requests by Army officials who are not "required users" or specifically designated by the SA to use executive aircraft before scheduling. Generally, executive aircraft will not be used except by "required use" officials to travel between CONUS and OCONUS destinations.

b. Eligibility. Within DA, only the SA and CSA are eligible to use executive aircraft assigned to the 89th Airlift Wing when Army executive assets are unavailable or otherwise unable to meet mission requirements, unless the Executive Secretary to the Secretary of Defense grants an exception.

c. The Chief, Legislative Liaison. The Office of the Chief, Legislative Liaison coordinates congressional use of executive aircraft in accordance with established procedures.

8. Operational Support Airlift

a. Use. The use of operational support airlift (OSA), both fixed- and rotary-wing, will be in accordance with applicable laws and regulations. Requests for use of OSA are processed in accordance with current directives and procedures.

(1) Every effort must be made to pool requirements to maximize use of the aircraft. Minor differences of only a few hours in travel schedules seldom warrant the use of separate aircraft. All requests must include an explanation why commercial passenger carriers (air or rail) cannot reasonably meet mission requirements. All requests for OSA fixed-wing support must include a 2-hour window for both departure and arrival times. When compelling operational considerations make strict timing critical to mission success, the request must still include a 2-hour window for either departure

or arrival times, as well as documentation of the compelling considerations. Requests without the provision of a 2-hour window or written justification will not be processed.

(2) Assets assigned to the U.S. Army Priority Air Transport Detachment are designated as Service Secretary-controlled aircraft. Mission requests for use of those assets must be sent to the Directorate of Executive Travel for validation and scheduling. Use of the detachment's assets is generally restricted to the SA, CSA, Under Secretary of the Army, Vice Chief of Staff of the Army, and four-star Army commanders, unless the SA directs otherwise.

(3) The AASA is the authorizing official for all OSA requests for HQDA senior officials and their field operating agencies and staff support agencies. MILAIR requests must be processed through the Directorate of Executive Travel to the AASA. These officials are designated as authorizing officials for OSA requests from within their commands or organizations, but they may not authorize their own military airlift:

- Chief, National Guard Bureau
- Director of the Army Staff
- Deputy Chiefs of Staff
- Chief, Army Reserve
- Chief of Engineers
- The Surgeon General
- Assistant Chief of Staff for Installation Management
- The Judge Advocate General
- Chief of Chaplains
- Provost Marshal General
- Commander, U.S. Army Military District of Washington
- Heads of field operating agencies and staff support agencies (major general or equivalent and higher)

(4) Commanders of ACOMs, ASCCs, and DRUs (major general or higher) are designated as authorizing officials for OSA requests from senior officials within their commands. ACOM, ASCC, and DRU commanders may delegate this authority in writing to the chief of staff or deputy commander (no lower than major general level) without further delegation authority. However, under no circumstances may Army officials other than the SA and CSA authorize their own use of MILAIR for "other official travel."

(5) The AASA is the authorizing official for three- and four-star Army commanders when travel is primarily for DA business. When traveling on business primarily for a combatant command, officials require authorization from their respective combatant command.

(6) MILAIR requests for personnel in pay grade O-6 or equivalent and below must be processed for approval as outlined in AR 95-1, chapter 3 and DoD Instruction 4500.43.

(7) The SA or his designee, the AASA, is the approval authority for employees of non-DoD U.S. Government agencies.

b. **Reporting.** All agencies that schedule OSA and/or executive aircraft will comply with reporting and validation requirements dictated by DoD Directive 4500.56 and higher authorities.

9. Space-Available Travel. In accordance with DoD Instruction 4515.13, section 4 and table 3, members of the uniformed services on active duty must be in a leave or pass status to register for Space-A travel, remain in a leave or pass status while awaiting travel, and be in a leave or pass status the entire period of travel. In accordance with DoD Instruction 4515.13, table 3, DoD civilian employees must be in a leave or nonduty (that is, weekend or holiday) status when traveling to register for Space-A travel. All Space-A passengers must pass physical and baggage screening in accordance with Defense Transportation Regulation 4500.9-R Part I (Passenger Movement) and undergo identity screening before boarding the aircraft in accordance with guidance from the Under Secretary of Defense (Acquisition, Technology and Logistics).³ All screenings are mandatory before boarding an Army aircraft for Space-A travel.

Note: To accept a Space-A passenger, an aircraft must be opened fully to all Space-A passengers who have registered with the appropriate operating agency at each terminal. Passengers must be properly prioritized and undergo identity screening with all other passengers awaiting Space-A transport. Space-A will not be used as a method for bypassing spouse travel policies or unofficial passenger reimbursement requirements, nor will individual seats on an aircraft be designated "Space-A" for the purpose of bypassing rules governing the appropriate use of Space-A.

10. Accompanying Spouse Travel

a. **General.** The Army recognizes the important and selfless contributions of its spouse and volunteer communities. However, it is vital that the Department comply with DoD policy and intent when travel by senior officials includes their spouses and/or dependents. DoD policy dictates that spouses or other Family members may not accompany DA military or civilian personnel on official business at Government expense unless specific and restrictive circumstances apply. (See paragraph 13, Unofficial Travel—Noninterference (Reimbursable) Travel, beginning on page 29.)

(1) Each instance of a request for a spouse to accompany a sponsor on official travel will be treated as an individual exception to the SA's travel policy and may be approved as an exception only by the appropriate delegated authorities indicated in paragraph 10e. Although spouse travel will be reviewed based on the merits of each request, approving officials can and should require sponsors to submit annual or semiannual plans for official travel that indicate in advance proposed or potential

³ Reference Memorandum, USD (AT&L), Oct 28 2013, subject: Transportation of Space-Available Passengers on Department of Defense Aircraft.

spouse travel. Delegated authorities should also be cognizant of the fact that a pattern of consistent and repetitive spouse travel generally is not consistent with DoD policy, which treats each instance of spouse travel as an exception.

(2) Requests for an exception to this policy for the approval of spouse travel will be submitted no later than 10 business days before departure and must include:

- a memorandum signed by the sponsor that clearly explains how the spouse's participation benefits DA given the additional cost to the Government and taxpayer perception.
- a separate spouse agenda that defines the focus and audience of the spouse's participation and identifies the tangible benefit to be derived from the participation. (Windshield tours, routine or repetitive site visits, social engagements, and similar events are not considered to be part of a substantive agenda.) An example of a spouse agenda is at enclosure 6.
- a copy of any invitation made by a DoD, Federal, or non-DoD entity where a spouse's presence is requested. (Note: An invitation is not required to justify spouse travel and in and of itself will not justify any instance of spouse travel.)

A legal review signed by the command ethics counselor is not required but highly encouraged.

(3) Accompanying spouses traveling on commercial aircraft at Government expense must fly coach class, unless otherwise authorized in accordance with paragraph 3 (Commercial Air Travel), beginning on page 7.

(4) Accompanying spouses traveling on MILAIR must travel in a noninterference (nonreimbursable) status. MILAIR must be independently authorized in accordance with the guidance in paragraph 5, beginning on page 16.

b. Exception to Policy. As an exception to policy and fully within the intent of paragraph 10a, spouses may accompany their sponsors on MILAIR or commercial aircraft at Government expense **only** when at least one of the following conditions is met:

(1) The spouse travels to a function where their sponsor is participating in his/her official capacity and where the spouse is to address those assembled or otherwise play a significant active and visible part. An example of a restriction to this rule is funded spouse travel to an event such as a change of command, funeral, retirement, or similar ceremony where a spouse has little or no participation beyond attendance, except in the extremely unusual circumstance when such an event may capture the national interest.

(2) The spouse travels to a function where their sponsor is participating in his/her official capacity and a substantial portion of those present are military Families

or the focus is on matters of particular concern to military Families. In these cases, the sponsor must determine in advance that the spouse's travel would clearly further the interests of DA or the command, and they must clearly substantiate these benefits in writing as part of the request for approval. This may involve the informal inclusion of a spouse as part of a command team, but those funded spouses will be the fewest required to meet the mission requirements, and the sponsor(s) must exercise good judgment to protect the Department's resources.

(3) The spouse's presence at an official function is deemed to be in the national interest because of a diplomatic benefit to the United States. Simply stated, when the spouse and sponsor are meeting with high-level foreign dignitaries and their spouses, the spouse's travel may be justified on MILAIR or commercial aircraft at Government expense. Documentation of foreign dignitary presence is required when this provision is the basis for approval of the spouse's travel.

(4) The spouse's presence at an official function is deemed to be in the national interest because of a public relations benefit to the United States. In other words, when the spouse and sponsor are meeting with persons and their spouses from outside DoD (such as members of the local, State, or national government or media), the spouse's travel may be justified on MILAIR or commercial aircraft at Government expense. Under this provision, a statement from the requesting official that the spouse's presence provides a public relations benefit to the United States and indicating the names or positions of the non-DoD attendees is required.

c. Independent Travel (in an Accompanied Status). In rare cases, spouses may travel independently of their sponsors to an official function, provided that any or all of the conditions in paragraphs 10b(1)–(4) are met and unusual circumstances exist (such as mobilization, deployment, or other compelling operational conditions) that prevent the sponsor from attending an event they normally would have been authorized to attend together. In these unusual circumstances, the spouse must travel in the most cost-effective manner available (which may include an already scheduled MILAIR flight or nontactical vehicle), must be treated as if in an accompanied spouse status, and is not authorized per diem. To be clear, this is an uncommon occurrence and must inarguably meet the requirements for accompanied spouse travel. Under this caveat, spouses are considered traveling in an "accompanied but independent status." Military aircraft and/or vehicles will not be scheduled nor diverted to locations solely for the purpose of moving a spouse to or from official events. Military air missions will not include travel to locations where the primary purpose is to pick up or drop off spouses and dependents.

d. Pier Diem. Spouses traveling in an accompanying spouse status are not permitted per diem.

Note: When a spouse is chosen to attend a major award ceremony (as defined by the JTR, Appendix E, section C4) by the award recipient or has been asked to stand in for a deceased member at the ceremony, the spouse's travel to attend the ceremony must be in strict accordance with the JTR, Appendix E, section C4 and generally is not governed by the spouse travel policy within this document.

e. Approval Authorities

(1) Each occurrence of spouse travel is to be approved on a case-by-case basis and in accordance with paragraph 10a. Blanket travel orders for spouses are not permitted.

(2) The AASA is the delegated approval authority for all spouse travel of Army Secretariat and Army Staff officials at Government expense on MILAIR or commercial aircraft except for the SA, CSA, Under Secretary of the Army, and Vice Chief of Staff of the Army. All requests for spouse travel must be:

- forwarded to the Directorate of Executive Travel for review and processing.
- submitted at least 10 working days before the travel. For actions requiring review by the Under Secretary of the Army or SA, requests must be submitted at least 15 working days before execution of the travel. Requests that do not meet this requirement may be returned without action.

(3) Approval authority for accompanying spouse travel outside HQDA is delegated to four-star Army commanders for their own spouses and the spouses of individuals within their organizations. They may further delegate this authority but no lower than the level of three-star general officer deputy commanding general or equivalent. All delegations must be in writing and retained by the delegate for the duration of the assignment. Commands without a four-star general officer within their chain of command will process spouse travel requests through the Directorate of Executive Travel to the AASA.

(4) Before approval, the authorizing official must ensure that all policies within this directive are met and sufficient funds are available to cover the cost of travel. All documentation related to the request and approval will be maintained for a minimum of 2 years.

(5) Joint or “dual-hatted” DA commanders of combatant commands follow their joint command approval process for accompanying spouse travel when traveling on behalf of the joint command. When traveling on DA business, they must follow the provisions of this directive.

(6) The Chief, National Guard Bureau is delegated the authority to approve the travel of the accompanying spouses of the 54 State, District, and Territory Adjutants General when they are traveling for Bureau business. The Chief may not further delegate this authority. However, when the State, District, and Territory Adjutants General are traveling on State, District, or Territory business, they are to follow the State, District, or Territory guidance governing accompanying spouse travel. In every case, the spouse must meet the tests of unquestionable official function with actual participation or significant diplomatic or public relations benefits.

11. Required Reporting for Accompanying Spouse Travel

a. Reporting Requirements. The approval authority must maintain complete documentation of approved accompanying spouse travel (as authorized in paragraph 10) on MILAIR and commercial aircraft for 2 years. Further, beginning with fiscal year 2017, approval authorities will report all instances of spouse travel at Government expense through the Directorate of Executive Travel to the AASA not later than 15 October of each year for the previous 12 months. The required reporting documentation includes:

- (1) name of the sponsor and spouse;
- (2) justification (that is, participation in an official capacity at an unquestionably official function, or diplomatic or public relations benefit);
- (3) destination;
- (4) duration;
- (5) per diem or incidental expenses the spouse was allowed;
- (6) copies of policy and legal reviews (if applicable) conducted on each instance of spouse travel; and
- (7) any associated documentation that helps justify the approval.

b. After the travel is complete, officials are strongly encouraged to document the results of the spouse's participation as a best practice. Although not mandatory, by providing such documentation during the reporting cycle, officials will help explain the intent behind approved spouse travel and may prevent requests for additional information during the review process.

c. The Directorate of Executive Travel will maintain the reports for at least 2 years.

12. Other Spouse Travel

Note: Paragraph 12 is intended for those generally rare instances when the spouse's travel is as a delegate to attend a "Service-endorsed training course," to be a statutory "volunteer" as strictly defined in 10 U.S.C. § 1588, or to serve as a subject matter expert. Courses designated "Service-endorsed" must have been approved at the HQDA Deputy Chief of Staff, G-3/5/7 Training Directorate and Secretariat (Office of the AASA) levels. Other uses of the guidance in this section solely to provide per diem are not authorized. Users must refer to paragraph 10 for policy governing all other circumstances involving accompanied spouse travel.

Travel to a conference will be requested, approved, and conducted in complete compliance with Army Directive 2015-01 (Army Conference Policy) or the current authenticated version of the conference policy.

a. General. Travel by spouses is usually accomplished in an unofficial accompanying status as provided for in paragraph 10. However, the guidance in paragraph 10 does not prevent spouses from traveling in an official capacity when their travel is unrelated to their sponsors' travel and is authorized in accordance with applicable policies. The authorizing official may authorize transportation, per diem, and/or actual expense allowances if the individual's travel is unquestionably mission essential and benefits DoD beyond fulfilling a representational role (see the JTR, Appendix E, Part 1, paragraph A.2.m(3)). The legal review will specifically address the independent authority for the spouse. Such travel will be accomplished pursuant to invitational travel authorization and per diem is authorized. Examples of independent authority include instances when the spouse:

(1) is a volunteer in accordance with 10 U.S.C. § 1588 and the travel is within the scope of the volunteer agreement; is unrelated to a program or command supervised by the sponsor; and is in strict compliance with the JTR, Appendix E, Part 1, paragraphs A(2)(b) and (c).

(2) is to attend a Service-endorsed training course and provide subsequent volunteer service incident to the training (for example, the Fort Leavenworth Pre-Command course) as specified by the HQDA Deputy Chief of Staff, G-3/5/7 Training Directorate. (*Note: Spouses attending approved Service-endorsed training may be authorized per diem, but spouses traveling with their sponsors to speak at such courses are not authorized per diem unless they are also required to attend the remainder of the course.*)

- **Course Approval Procedures.** All requests for approval of an Army course of instruction as "Service-endorsed" will comply with SA conference policies and the requirements of the HQDA Deputy Chief of Staff, G-3/5/7 Training Directorate. Governing conference policies and the status of Service-endorsed training courses within DA changed significantly over the past few years. Activity personnel are strongly encouraged to familiarize themselves with these changes before determining travel plans for their respective officials.
- **Travel Approval.** Once a course has been approved as Service-endorsed training, selected delegates may attend the training at Government expense and receive the same travel allowances as a Soldier or DA Civilian employee who is on TDY. The normal order-issuing official for invitational travel authorization approves the travel on a case-by-case basis.

Note: Under no circumstances may the spouse of a Soldier or DA Civilian employee be authorized separate reimbursement for the lodging portion of per diem if the Soldier or civilian employee is on TDY to the same conference, is concurrently on TDY in the

same commuting area of the conference, or resides within commuting distance of the conference site.

(3) will confer with DoD officials on DoD matters as a subject matter expert. In this instance, the individual's status as a spouse is incidental to his or her status as a subject matter expert, and the circumstances of travel are not to be confused with accompanying spouse travel. Under this authority, the spouse may be issued an authorization through normal procedures if a sufficient case has been made to qualify the individual as a subject matter expert. However, DA policy is that spouses traveling to participate in discussions on Army Family programs or quality of life issues must travel in an accompanying spouse status (per diem not authorized) in accordance with paragraph 10.

Note: To qualify as a subject matter expert, care must be taken to provide documentation that clearly indicates the unique professional, educational, or life-earned experience or skills that elevate one spouse above others for the topic at hand. For example, a spouse has earned a degree, completed a unique level of training, or has unquestionable life experience in a specific topic area unique to the general population of spouses and that knowledge would be of vital benefit to the event.

b. Reporting. Commanders of ACOMs, ASCCs, and DRUs must retain the documentation necessary to report, when required, a detailed summary of travel for Service-endorsed training events, along with detailed costs to the Army for that travel, to the HQDA Deputy Chief of Staff, G-3/5/7's Training Directorate and/or the AASA.

13. **Unofficial Travel—Noninterference (Reimbursable) Travel**

a. Definition. Noninterference (reimbursable) travel is travel by a spouse, dependent, or other non-Federal traveler NOT on official business in the company of a senior DoD official (normally code 1, 2, and 3 civilians, and code 2 and 3 general officers) traveling on official business on MILAIR. This is not Space-A travel.

b. Authorization. Noninterference travel is only authorized if **all** of the following conditions are met:

(1) MILAIR is already scheduled for an official purpose and the sponsor is onboard the aircraft;

(2) the noninterference use does not require a larger aircraft than is needed for the official purpose;

(3) official travelers are not displaced;

(4) the travel results in negligible additional cost to the Government; and

(5) the Government is reimbursed at the full commercial coach-class fare or equivalent. The full coach-class fare is defined as any coach fare that is available to the

general public (not a City Pair airfare or other fare limited to official Government business) between the day the travel was planned and the day the travel occurred, including restricted fares, provided the traveler would otherwise be able to satisfy the restrictions associated with the particular fare if traveling via commercial air.

c. Reimbursement. This travel must be approved in advance and in writing. The senior DoD official must follow reimbursement procedures required by DoD Directive 4500.56 and DoD Instruction 4500.43. Contracted City Pair fares may not be used for reimbursement of unofficial travel.

d. Approval Process. Approval must be in accordance with the authorization procedures for spouse travel in paragraph 10.

14. **Motor Vehicle Transportation**

a. Governing Policy. AR 58-1 (Management, Acquisition, and Use of Motor Vehicles) governs the use of motor vehicle transportation, including the procurement and use of sport utility vehicles (SUVs). This section highlights guidance in that regulation for nontactical vehicles.

b. Legal Authority. Title 31 U.S.C. § 1344 identifies those officials who are authorized home-to-work transportation. Within DA and CONUS, only the SA and CSA are authorized home-to-work transportation.

(1) With certain limited exceptions prescribed by statute, home-to-work transportation is not transportation for an official purpose and is prohibited. Normally, such transportation is a personal responsibility. Title 31 U.S.C. § 1344 establishes criteria for exceptions to this policy and for reporting those exceptions to Congress. Within DA, only the SA can approve exceptions.

(2) Individuals who are authorized home-to-work transportation may incur personal tax liability in connection with this Government-furnished service regardless of the circumstances. The law (31 U.S.C. § 1349(b)) provides that civilians who willfully violate 31 U.S.C. § 1344 may be suspended without pay for a minimum of 30 days or, when circumstances warrant, for a longer period, or may be summarily removed from office. Military personnel who willfully use or authorize the use of Government vehicles for other than official purposes can be disciplined under provisions of the Uniform Code of Military Justice or other administrative procedures, as appropriate.

c. After-Hours Functions. Transportation to official after-hours functions is treated as an exception to policy that requires prior approval from the installation commander or his/her delegated authorizing official. All transportation to after-hours functions must begin and end at the individual's normal place of duty.

d. Miscellaneous Activities. Requirements for official motor vehicle transportation do not include transportation to private social functions, personal errands, or side trips for unofficial purposes, transportation of dependents or visitors without an

accompanying official, or transportation in support of non-DoD activities unless specifically approved under the provisions of Army regulation(s).

e. Official Use. The use of Army nontactical vehicles is restricted to official purposes in strict accordance with AR 58-1.

(1) Transportation may be provided for military and DoD civilian personnel officially participating in public ceremonies, military field demonstrations, and parades directly related to official activities.

(2) Changes of command, promotions, retirements, and unit activations and deactivations are considered official business internal to the Army community. Attendance by the Army community is encouraged because the presence and recognition of colleagues and peers improves the morale and spirit of the activity and the Army. However, Government motor vehicle transportation should be managed, and the installation commander should use a common sense approach. For example:

- 10 sedans should not drive to the same function when a small bus or passenger van would accomplish the mission. The distance traveled should be reasonable either within the installation or among installations and activities.
- group transportation is not feasible for some occasions, such as an after-event official meeting, and the use of multiple vehicles to the event is necessary.

The commander is responsible for preventing abuse of this policy. All Army employees are responsible for the prudent use of Government resources. Within the NCR, officials must refer to the AASA's Policy and Procedures Governing the Use of the Executive Motor Pool for additional policies specific to authorized users of the Pentagon Motor Pool. Copies of the policy are available by request from the Directorate of Executive Travel.

f. Spouses. Spouses of DA officials may be authorized transportation in Government vehicles only when they are:

(1) accompanying their DA sponsor, the use of the vehicle has already been authorized to accomplish official business, and space is available. Such transportation must be provided at no additional cost to the Government, and the spouse's presence may not require a larger vehicle than already authorized to accomplish official business.

g. Non-DoD Use. Transportation support to other U.S. Government agencies or non-U.S. Government entities may be provided only under strict guidelines. Normally, the requesting activity is required to reimburse the costs for transportation support to non-DoD activities. DA officials must review established guidelines and obtain required approvals before inviting travel or committing Army support.

h. Sport Utility Vehicles

(1) SUVs are a unique class of motor vehicle. Generally, SUVs have poor gas mileage ratings and cost more to lease or purchase. When a smaller, more cost-effective vehicle meets mission requirements, a larger SUV must not be purchased, leased, or used. SUVs are not authorized because of rank, prestige, or personal convenience.

(2) Commanders of ACOMs, ASCCs, and DRUs and directors of Army agencies must reduce the use of SUVs. These vehicles should be phased out as the lease expires except in all but the most highly justified instances.

(3) Justification requests for SUVs must be based on a valid table of distribution and allowance authorization that must be routed through appropriate channels and approved in accordance with AR 58-1.

(4) SUVs may be authorized in direct support of police, fire, rescue, criminal, investigative, and intelligence activities. Recruiting and military entrance processing activities in areas (northern tier installations) where snow, sleet, and freezing rain would terminate the mission for lengthy periods may also use SUVs.

15. Acceptance of Payment From a Non-Federal Source for Official Travel Expenses

a. Legal Authority. Title 31 U.S.C. § 1353 is the primary authority for the acceptance of gifts of official travel and related expenses on behalf of the Army. When that statute applies, it must be used to the exclusion of other authorities. The definition of terms and policies under this statute are at 41 Code of Federal Regulations Part 304.

b. Approval Authority. Heads of component commands or organizations may delegate approval authority to accept official travel payments from a non-Federal source to a division chief under their supervision serving in the grade of colonel or the civilian equivalent. All delegations must be in writing. Before authorizing acceptance of an outside payment of official travel and related expenses, travel-approving authorities must consult with their own or the traveler's ethics counselor and obtain a written determination from the ethics counselor that acceptance is appropriate.

c. Acceptance. Before travel, employees must have approval to accept payment from a non-Federal source. Once travel has started, limited changes can be made.

(1) If the Army has previously approved acceptance of travel benefits under 31 U.S.C. § 1353, an employee may accept those travel benefits as long as the:

- expenses paid in kind are comparable in value to those offered or purchased by other similarly situated meeting attendees, and

- Army did not previously decline to accept payment for these particular expenses in advance of travel.

(2) If the Army has not authorized acceptance of any payment from a non-Federal source before travel, you may accept payment from a non-Federal source as long as:

- the travel offered is the type of travel expense the existing travel authorization allows (meals, lodging, or transportation), but not recreational or other personal expenses, and
- the travel expenses are within the maximum allowances stated within the existing travel authorization, and
- you request the Army's authorization for acceptance from the non-Federal source within 7 working days after the trip ends.

(3) If the Army does not authorize acceptance from the non-Federal source, you must either:

- reimburse the non-Federal source for the reasonable approximation of the market value of the benefit provided, or
- reimburse the non-Federal source and claim the amount on your Government travel voucher.

d. Additional Conditions. In addition to the criteria at 41 Code of Federal Regulations Part 304, payment from a non-Federal source for official travel expenses may be accepted only when these conditions are met:

(1) the offer of travel expenses to a meeting or similar function relating to the official duties of the employee is unsolicited and completely voluntary;

(2) the gift is to be used only for official travel (the traveler must qualify for and be on official travel orders);

(3) the gift is to be used only for conferences, meetings, or similar functions related to the official duties of the traveler. An employee may not accept an offer of travel expenses to perform functions essential to an Army mission (such as inspections and oversight visits), attend sales presentations, or attend or participate in a musical performance; and

(4) the gift of travel does not create a conflict of interest. The approval authority must determine that acceptance would not cause a reasonable person in possession of the relevant facts to question the integrity of Army programs or operations.

(5) the payment is in the form of a check or similar instrument made payable to the Army. Cash may never be accepted.

e. Spouses. An offer of free travel for an accompanying spouse must be processed and approved in accordance with paragraph 10 of this directive. Such requests must be evaluated on the basis of whether it is in the Army's best interest to accept the offer and whether it is appropriate and permissible to place the spouse on official travel orders to attend the event.

f. First Class Travel Offers. The SA retains the authority to approve all first class travel. Requests for first class air travel, including those paid by a non-Federal source, must be fully justified under the applicable provisions of the Joint Ethics Regulation. This requirement applies to the traveling official and accompanying spouse.

g. Reporting Requirements. The following reporting requirements apply to the acceptance of travel payments from a non-Federal source.

(1) To simplify the travel voucher process, travelers are encouraged to accept "in-kind" travel expenses (that is, prepaid tickets and hotels), instead of cash reimbursement. If reimbursement is in the form of a check, it must be made out to "Department of the Army" and deposited with the servicing travel office.

(2) Travelers must report to their ethics counselors the acceptance of travel and related expenses exceeding \$250. The report must contain the traveler's certification that "the statements in this report are true, complete, and correct to the best of my knowledge." The report must be submitted to the ethics counselor for review and signature within 30 days after completion of the travel. A suggested format for this report is at enclosure 7.

(3) Ethics counselors must use Standard Form 326 or OGE Form 1353 (Semiannual Report of Payments Accepted from a Non-Federal Source) to consolidate reports from travelers in their jurisdiction. The report must be electronically submitted to the Ethics, Legislation, and Government Information Practices Branch; Administrative Law Division; Office of the Judge Advocate General. Reports of gifts received from 1 April through 30 September are due to the Office of the Judge Advocate General by 15 November. Reports of gifts received between 1 October and 31 March are due by 15 May. Ethics counselors must maintain the reports travelers submitted for 1 year after submission. The reporting forms are available on the Office of Government Ethics Web site at <http://www.oge.gov/Forms-Library/OGE-Form-1353--Semiannual-Report-of-Payments-Accepted-from-a-Non-Federal-Source/>.

16. Use of Executive Car Services. The use of executive car services (that is, privately contracted limousines and non-Government leased executive sedans) is reimbursable only at the fair market rate of taxicabs and airport transportation services during periods of official TDY. Costs in excess of fair market rates for these services are borne by the official and will not be reimbursed. Additional charges, such as "waiting time" fees associated with the use of executive car services, are not authorized.

Officials are encouraged to use local public transportation resources for travel to and from TDY locations. Reimbursement for commercial transportation from residence to permanent duty locations is not authorized.

FOREIGN TRAVEL DATA SHEET

(Submit to Office of International Conferences, U.S. Department of State)

Preliminary Report

(Complete before foreign travel to an international conference.)

Name of Traveler (Last, First): _____

Employing Department or Agency: _____

Title/Host of International Conference Attended: _____

Will more than two foreign governments attend? YES ___ NO ___

Name of Official Authorizing Travel: _____

Purpose of Travel: Select Code: (1) member of delegation, (2) technical/administrative support to delegation, (3) meetings with foreign officials outside the conference, (4) other (specify). _____

Date Travel Begins: _____ Date Travel Ends: _____

Contact Telephone Number: _____

Final Report

(Complete within 30 days after travel ends.)

Name of Traveler (Last, First) _____

Conference Attended/Host _____

Date Travel Began: _____ Date Travel Ended: _____

Actual Cost of Travel: _____

Complete the following only if changes occurred since the preliminary report:

Employing Department or Agency: _____

Name of Official Who Authorized Travel: _____

Purpose of Travel: _____

SAMPLE MEDICAL FORMAT FOR OTHER THAN ECONOMY-/COACH-CLASS TRAVEL—MILITARY TRAVELERS

Follow these steps when a DoD traveler requests OTECC flight accommodations because of a disability or other physical impairment:

Step 1: The traveler completes Part I (Military Traveler's Statement of Disability or Other Physical Impairment) and submits it to the authorizing/order issuing official (AO).

Step 2: The AO reviews Part I and completes the OTECC checklist. The AO must certify that all decision factors and other alternatives were considered before recommending approval (that is, the cost, other means to accommodate the traveler's condition, and requirement to accomplish the mission). The AO notifies the traveler if he/she may pursue OTECC travel and instructs the traveler to have a competent medical authority (a licensed medical practitioner) complete Part II (Medical Documentation Requirements—Military) of the OTECC travel package.

Step 3: The traveler's physician completes Part II to provide acceptable medical evidence to support or refute the OTECC claim and returns Part II to the traveler in a sealed envelope.

Step 4: If the physician indicates that OTECC travel accommodations are necessary, the traveler forwards the completed documents (Parts I and II) to the AO. (The physician's assessment must remain sealed.) If the physician indicates that OTECC travel accommodations are not necessary, the traveler informs the AO and the approval process stops.

Step 5: The AO forwards Parts I and II to the appropriate OTECC approval authority for approval and signature.

Step 6: The OTECC approval authority completes Part III (Determination of Approval Authority for OTECC Travel) and approves or denies the use of premium class travel. The premium class approving official must keep a copy of the complete package (Parts I, II, and III) for audit purposes and forward a copy of Part III to the AO.

Step 7: If OTECC travel accommodations are approved, the AO must ensure that the travel order/authorization is annotated to show the (i) approval of business or first class (as appropriate) travel for medical reasons, (ii) name and rank of the approving official, and (iii) cost difference between coach class and the approved premium class accommodations. The AO will inform the traveler accordingly.

Step 8: With a copy of the approved OTECC travel order/authorization, the traveler can make travel arrangements through the commercial travel office.

Note: With limited exceptions, medical information about travelers must be kept confidential, even if it contains no medical diagnosis or treatment course or was not generated by a health care professional. Do not keep medical information in regular personnel files. Instead, store it in a separate medical file that only designated official personnel can access. Medical information stored electronically must be similarly protected (for example, by storing it in a separate, safeguarded database).

PART I – Military Traveler’s Statement of Disability or Other Physical Impairment

(Read the Privacy Act Statement at the bottom of the page before completing this document.)

- 1. Traveler’s Name (last/first/middle): _____
- 2. Travelers Rank: _____ 3. Last 4 SSN: _____
- 4. Service/Agency: _____
- 5. Organization: _____
- 6. Work Phone (commercial and DSN): _____
- 7. Email Address: _____
- 8. Mode of Travel (air, ship, train): _____
- 9. Travel Purpose (see reporting instructions for premium class travel): _____
- 10. Location where premium class travel segments start and end (enter all segments)
 - Origin: _____ Destination: _____
 - Origin: _____ Destination: _____
 - Origin: _____ Destination: _____
- 11. Date Travel to Begin: _____
- 12. Fare for Premium Travel: \$ _____ 13. Fare for Coach Class: \$ _____
- 14. Ticket Issuing Location (name and location of commercial travel office): _____

- 15. Reason for Requesting Premium Class Travel, Reference JTR, para. _____
- 16. Describe your medical condition (disease, disability or other physical impairment) and how it interferes with traveling in coach class. _____

- 17. Give the approximate date (month/year) your medical condition began to affect your ability to travel without special travel accommodations. _____
- 18. What is the expected duration of your medical condition? _____
- 19. What reasonable accommodation (bulkhead seating, two adjoining coach seats, seat cushion, aisle seat, etc.) could be made so that you could travel in coach class? _____

CERTIFICATION AND CONSENT BY TRAVELER

I hereby certify that all statements made here are true to the best of my knowledge and belief. I hereby give my permission for the release of information about my service and medical condition(s) (that is, disease and injury) to authorized agency officials and medical consultants.

 Signature (Do Not Print) _____
 Date

Privacy Act Statement. In compliance with the Privacy Act of 1974, the following information is provided. Basic authority for requiring the requested information is in 5 U.S.C. §§ 5701–5733, particularly §§ 5721–5733, 30 U.S.C. § 905 and Executive Order 9397. Your disclosure of the data is voluntary. The principal reason for collecting the data is to determine the amount to reimburse a traveler for expenses incurred in connection with temporary duty travel. Information may be transferred to appropriate Federal, State, local, or foreign agencies when relevant to civil, criminal, or regulatory investigations or prosecutions. You have no personal liability if you do not provide the requested information; however, we may not be able to reimburse you for your expenses.

PART II – Physician’s Statement Instructions—Military

The individual identified on the next page is requesting medical documentation that can be evaluated, along with other information, in connection with his or her request for an upgrade in air travel to other than economy-/coach-class (OTECC) (business class/first class) as a reasonable accommodation. In your report, please specify the physical and environmental requirements connecting the identified disability or other physical impairment to the requested accommodation and whether alternative means, such as bulkhead seating, aisle seating, or two adjoining coach-class seats, could accommodate the traveler’s condition.

The applicant is responsible for any cost incurred in connection with providing this documentation.

A new medical examination is not necessary if your records provide adequate documentation no more than 6 months old, or 12 months for validated permanent disability or physical impairment.

Please provide the medical documentation requested under “MEDICAL DOCUMENTATION REQUIREMENTS.” It is important that you respond to every item. If you do not have sufficient space for your response, please use a continuation sheet that indicates the corresponding item number for the item you are responding to. If an item is not applicable to the applicant’s medical condition, enter “Not Applicable.” After completing the document, please add your medical stamp and signature to the document.

Enclose your report and any attachments in a sealed envelope marked “MEDICAL DOCUMENTATION – PRIVILEGED – PRIVATE” and give the envelope directly to the applicant.

PART II – MEDICAL DOCUMENTATION REQUIREMENTS—MILITARY

The following information is provided about (full name of traveler):

1. Diagnosis of disability or physical impairment associated with OTECC accommodations:

2. Clinical findings that relate to the reason for travel upgrade from the most recent medical evaluation, including any of the following that have been obtained: findings of physical examination; results of laboratory tests, X rays, EKG,s and other special evaluations or diagnostic procedures; and, in the case of psychiatric diseases, the findings of mental status examinations and results of psychological tests.

3. Assessment of current clinical status, relevant medications prescribed, and plans for future treatment:

4. What is the expected duration of the disability or physical impairment?

5. What is the probability that the individual may suffer injury or harm if he or she is not accommodated? Explain the medical basis for your conclusion.

6. Explain the relationship between the traveler’s request for OTECC travel and the traveler’s medical condition(s). Can the medical condition(s) be accommodated by any means other than travel in premium class? If the answer to any of the following questions is *no*, please fully explain the reasons for your response and the relation to the traveler’s medical condition.

a. Can the traveler’s medical condition(s) be accommodated by travel in bulkhead seating? Yes or No

b. Can the traveler’s medical condition(s) be accommodated by travel in aisle seating? Yes or No

c. Is the traveler medically able to tolerate seating in coach class for any period of time? Yes or No
If the answer to this question is *yes*, please state the maximum duration. _____

d. Can seating in coach class with periodic movement around the cabin accommodate the traveler’s medical condition(s)? Yes or No

e. Can the traveler’s medical condition(s) be accommodated by periodic in-flight exercises designed to minimize the physical effects of the flight? Yes or No

f. Can the traveler’s medical condition(s) be accommodated by the purchase of two adjoining coach seats? Yes or No

7. Does the traveler require an attendant for medical services during travel? Yes or No If so, is it necessary for the attendant to be constantly with the employee while en route? Yes or No If so, explain the duties of the attendant during the time of travel.

8. Physician’s Recommendation:

- _____ Approval
- _____ Approval with modifications as noted in comments.
- _____ Denial based on reasons indicated.

Comments:

9. Physician's stamp:

<hr/> <p>Signature</p>	<hr/> <p>Date</p>
<hr/> <p>Phone Number</p>	<hr/> <p>Email Address</p>

Part III – Determination of Approval Authority for OTECC Travel

The request for first class/business class travel for (enter full name of traveler)
_____ is approved/disapproved.

Type Full Name, Rank and Office Symbol of
Premium Class Approving Official

Date

Signature of Approving Official

Date

CONTRACTOR IDENTIFICATION MEMORANDUM/LETTER OF AUTHORIZATION

<OFFICIAL AGENCY LETTERHEAD>

MEMORANDUM FOR TRAVEL AUTHORIZING OFFICIAL

SUBJECT: Travel of Government Contractor by Military Aircraft

1. <Full Name of Contractor, Social Security number>, with <Name of Company>, is authorized as a required passenger aboard military aircraft to travel to <Location> on <Dates> for the purpose of <Detailed Justification>. Commercial transportation cannot meet the requirements of this mission because <Reason>. This authorization is made in compliance with DoD Instruction 4515.13, paragraph 3.6.k.

2. This individual is assigned to this mission in accordance with the terms of DoD Contract <Contract Number>. This person's presence on this mission does not displace other official Government passengers, nor will the size of the aircraft be increased as a result of this person's presence on the flight.

3. *If contract includes travel funds for commercial travel, then include: <Name of Company/Individual> must reimburse the Government within 5 days of completion of travel at the commercial coach fare for this trip. The billing address for reimbursement is <Contractor Billing Address>.

<Signature of Senior Official>

COMPARISON CHART OF ESTIMATED TIMES AND DISTANCES BY HELICOPTER

Location	Ground	Ground Times		Air	
From the Pentagon to...	Statute Miles	Non-Rush (Hours)	Rush (Hours)	Nautical Miles	Time (Hours)
Aberdeen Proving Ground	75	1.50	3.00	55	.80
Joint Base Andrews	15	0.25	0.83	9	.40
Antietam National Battleground	80	2.00	3.00	36	.40
Baltimore City/Vicinity	45	1.00	1.50	30	.40
Carlisle Barracks	115	3.00	4.00	80	1.00
Charlottesville	120	3.00	4.00	78	1.10
Chancellorsville National Battlefield	60	1.33	2.20	45	.65
Fredricksburg National Battlefield	60	1.33	2.20	40	.60
Fort A.P. Hill	70	2.00	3.00	49	.65
Fort Detrick	55	1.00	2.00	36	.50
Fort Lee	125	3.00	4.00	97	1.20
Fort Meade	30	.75	1.25	20	.40
Gettysburg National Battlefield	85	2.00	3.00	55	.80
Patuxent Naval Air Station	78	2.00	2.50	46	.65
Quantico Marine Base	35	1.00	1.50	24	.40
Xerox Training Center	35	1.00	1.50	26	.40

VIP CODES FOR AIRLIFT REQUESTS

1. President or Heads of State.
2. Vice-President, Cabinet Members, Members of Congress, Governors, Service Secretaries and Chiefs of Staff, and Five-Star Generals.
3. Under Secretaries, Assistant Secretaries, Vice Chiefs of Staff, and Four-Star Generals.
4. Deputy Assistant Secretaries, Three-Star Generals and their SES equivalents, Senior Enlisted Advisor to the Chairman of the Joint Chiefs of Staff (SEAC); Sergeant Major of the Army, Chief Master Sergeant of the Air Force, Master Chief Petty Officer of the Navy, and Sergeant Major of the Marine Corps.
5. Two-Star General Officers and SES equivalents.
6. One-Star Generals and SES equivalents.
7. Army/U.S. Air Force Colonels, U.S. Navy Captains (O-6), and GS-15s.

SAMPLE OF SEPARATE SPOUSE AGENDA**YOUR LETTERHEAD**

SUBJECT: Itinerary for Visit of Mrs. John Doe, Spouse of GEN John D. Doe, Vice Chief of Staff of the Army

IN PARTY: Mrs. Doe will be accompanied by MAJ Able during her visit.

PURPOSE: The purpose of this spouse trip includes gaining detailed knowledge of key Family issues affecting Fort Baker and participating in events beyond mere attendance in a way that will produce a tangible benefit to the U.S. Army. Upon the spouse's return to Washington, DC, she will meet with senior leaders to discuss lessons learned and propose a way forward from a spouse's perspective. (Additional detail required.)

Monday, 8 September 2014

0900 Arrive Fort Baker International Airport; met by Protocol
 0900-1030 Airport procedures
 1030-1100 En route Distinguished Visitors Quarters (DVQ); activities as desired
 1100-1130 Orientation Briefing (copies of briefing attached)
 1130-1230 Lunch hosted by Mrs. Smith with roundtable discussion on quality of life issues having highest community interest (Cathy Rogers, Spouse, CSM; Robin White, Spouse, DC; Doris Brown, Spouse of Cdr, 17th ASG; Barbara Carter, Spouse, Cdr, USARPAC)
 1230-1240 En route Army Community Services (ACS)
 1240-1315 ACS brief/open discussions with ACS staff regarding program needs and unique concerns, and tour of facility
 1315-1320 En route Community Activities Center
 1320-1400 Sensing session with New Parent Support Program Group to include active duty and spouse participants (detailed discussion of purpose and benefits here AND after each official event. Windshield tours do not meet requirement for substantive content.)
 1400-1405 En route Child Development Center (CDC)
 1405-1445 Visit CDC/discussions with caregivers and CDC staff regarding needs and services provided
 1445-1450 En route Youth Activities
 1450-1530 Visit Youth Center/discussions with Youth Activities staff about Youth Programs
 1530-1540 En route Library
 1540-1615 Visit Library/check current available resources and response times on ordered materials
 1615-1630 En route DVQ
 1630-1750 Activities as desired and prepare for reception
 1750-1800 Walk to Community Club
 1800-TBD Reception and Dinner

Tuesday, 9 September 2014

0755-0800 En route Quarters 1000
 0800-0900 Breakfast hosted by Mrs. Smith
 0900-0905 En route Elementary School
 0905-1000 Visit Elementary School/discussions with the principal on standards for DODDS and where the school falls in the large overall picture compared with elementary schools in the U.S.
 1000-1005 En route Community Support facilities
 1005-1115 Visit and prep with community leaders
 1120-1300 Army Family Team Building/Family Support meeting/working luncheon. Discussions about quality of life issues with a cross-section of battalion spouses with opening and closing remarks by Mrs. Smith (copies of briefing slides and/or closing remarks attached).

**REPORT OF PAYMENT OF TRAVEL AND RELATED EXPENSES
ACCEPTED FROM NON-FEDERAL SOURCES
(31 U.S.C. § 1353)**

Employee's Name: _____

Command Organization: _____

Employee's Position: _____

Spouse's Name (if applicable): _____

EVENT (for which more than \$250 in travel and related expenses were donated): _____

Nature /Title of Event: _____

Sponsor: _____

Location: _____

Dates: From: _____ To: _____

TYPE OF DONATION: _____

Donating Organization: _____

Total Amount:

Amount of Payments In-Kind for Employee: _____ for Spouse: _____

(prepaid conference fees, hotel costs, airline tickets, prepaid meals, etc.)

Amount of Payments by Check for Employee: _____ for Spouse: _____

(Check must be made to "Department of the Army." Submit to your travel office.)

Itemized Expense:

Hotel: _____ Meals: _____

Airline: _____ Other: _____

"I certify that the statements in this report are true, complete and correct to the best of my knowledge."

Signature of Traveler

Date

SUBMIT REPORT TO YOUR ETHICS COUNSELOR WITHIN 30 DAYS

Ethics Counselor Printed Name

Signature

Date