

## Amending Authorizations Quick Reference Card

Amending an authorization allows you to make changes to an approved authorization. The process includes three basic steps:

- Selecting the trip
- Making your changes
- Submitting the amended authorization for approval

# See **UG26 Amending Authorizations** for more detailed information.

#### **Overview of Amendment Process**

1. Click the My E2 "Trips" tab, locate the trip you want to amend and click the **Show** link.

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Filter Opt											
		Dato 👻 🛛 Sort Ascending	Sort Descending								
Trip Id	OAIGAN	Destination	Departure Date	Purpose	Approver	Auth	Voucher	Advance	Show	Copy Trip	Anthin
143669		Monterey, CA, United States	25-449-2011	Oregie		~		~	Shew.	Cepy	
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three 10	25 50 ke	ma per paga						Shewing 11 -	12 of 13	c e First « Pre	views & L

#### My E2 Trips tab

The Trip Dashboard appears.

QUICK LINKS	Trip Dashboard								
None evaluation	Traveler Name	DANA AALINSTON	Trip ID: 143669	Trip ID: 143669					
Trips List					Collapse Al Sections	Expand All Section			
Cancel Trip	Authorizations								
Create Trip Template	Begin Date	End Date	10	Total Amount Status	State Show	Delete			
	26-Aug-2011	25-Aup-2011	143000	\$713.00 Approved	🖌 Show				
	Amend Au	thorization							

#### **Trip Dashboard**

2. Click **Amend Authorization**. The Basic Information page appears.

Step 1 : Basic Information	Step 1 : Basic Info	mation 😨		
Step 2 : Basemation	Traveler Name: DANA ARLING	TON	Trip ID: 143999-1	Authorization Status: New Authorization
Stop 4 - Expenses	Basic Information			
Step 3 : MS.Dateman	Type of Travel:*	Conference		
They D - According	Specific Travel Purpose:*		1	
Step 7 : Yranni Policy	Document Number:	1000143669		
Step 8 - Summery	"Required			
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#### **Basic Information page**

- 3. Move through the workflow and make changes. Be sure to **Save** the changes before exiting a window or page.
- When you are finished making changes, go to the Summary page and click Send to Approver.

## **Completing Basic Information**

You can modify the following information:

- Type of Travel
- Specific Travel Purpose
- Document Number (if manual document number is enabled)

#### **Completing Reservations**

You can make changes to your reservation online if the air reservations were booked online via E2, **and** the reservations have not been ticketed.

- 1. Go to the Reservation step, locate the reservation you want to change and click the **Change Existing Reservation** link.
- 2. Click Confirm.

To retrieve an existing reservation that has been booked online via E2:

- 1. Click the **Manage Trip Reservations** link on the Reservations page.
- 2. Click on the **Select** checkbox next to the reservation you want to retrieve.
- 3. Click Select and Close.

If you requested agent assistance, you must retrieve your changed reservation.

- 1. Click the **Manage Reservations** link on the Reservations page.
- 2. Enter your reservation **Confirmation Code** (PNR).
- 3. Click **Retrieve**.

#### **Completing Site Details**

If there are associated reservations, this page reflects the reservations details.

- You cannot make changes for any dates for which you have been paid lodging or Meals & Incidental Expenses (M&IE) on a voucher.
- Removing breaks is allowed. Removing a break from a day will enable lodging and meal expense estimates to be entered. For per diem meals, if the day going on break and day returning from break have been paid on a voucher at per diem reimbursement rates, they will now be eligible for the additional 25% M&IE (bringing the total M&IE to 100%).

#### **Completing Expenses**

If you make changes to your travel itinerary or reservations, review your new estimated expenses and the selected reimbursement types.

- Transportation and other expenses can be added, changed or deleted.
- Lodging and meal expenses can be changed for dates for which expenses have not been paid on a voucher.

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- A day can be identified as a leave day or official day off provided the day has not had lodging or meals paid on a voucher. This will zero out lodging and M&IE expenses for that day.
- Leave can be removed from days that had been identified as a leave day or official day off. Removing leave from a day will enable lodging or meal expenses to be entered.

## **Completing NFS Expenses**

All NFS detail information can be added, modified or deleted. The NFS expenses cannot exceed the total estimated expenses on the amended authorization.

## **Completing Accounting Information**

If your estimated expenses have changed, make sure the allocations total 100% of your estimated expenses.

If the **Total claim amount** on the Accounting section of the Summary page differs from the **Amount** shown on the top of the Expenses section, you need to reallocate your expenses to fund your trip.

- Accounting values can be added or changed, but cannot be removed or reduced to values below any amounts already identified on paid advance or vouchers associated with the trip.
- Split funding can be changed if the values associated to each account code are greater or equal to values identified on paid advances or vouchers associated to the trip.

#### **Completing Advances and Advance Accounting Information**

- Advances can be added according to the advance configuration and rules for the traveler.
- Advance accounting values can be added or changed, but cannot be removed or reduced to values below any amounts already identified on paid advances associated with the trip.

#### **Completing Travel Policy Information**

This page displays any items that may be outside your agency's travel policy. If air, car or rail reservations are out of policy, you need to select a reason for being out of policy.

## Submitting the Amended Authorization for Approval

After making your changes, the amended authorization must be approved. You will receive emails as your authorization moves through the approval process.

For amended trips under an open or group authorization:

- 1. Click **Complete Trip Authorization** on the Summary page. If the amended authorization does not exceed OA or GA limitations it automatically inherits approval from the OA or GA. A confirmation window appears.
- 2. Click Confirm.

For other amended authorizations, the amendment may receive automatic approval if it is within travel policy tolerances. If it is outside tolerances, it will be routed through the normal approval process.

1. Click Send to Approver.

If there is a problem with the authorization, an error message describes the problems and the corrective actions needed. Make your corrections, and click **Send to Approver** again.

If you need additional assistance, contact your travel policy manager.

2. If no problems are detected, click **Confirm**.

#### **Deleting an Amendment**

You can delete an amendment at any point prior to approval as long as you have not made reservation changes.

- 1. Click the **Delete Amendment** link in the EXTRAS section.
- 2. Click **Confirm**. The authorization reverts to its previous status.

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