## 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

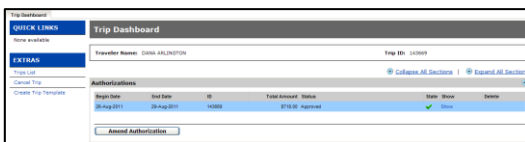See **UG26 Amending Authorizations** for more detailed information.

### Overview of Amendment Process

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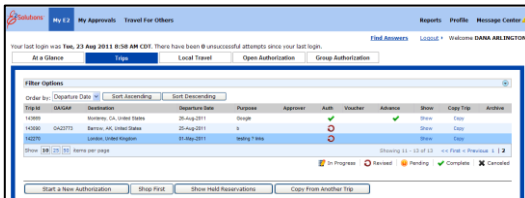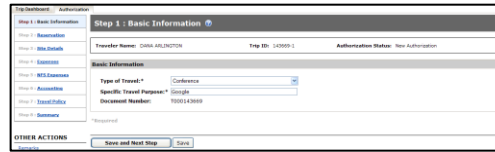


**My E2 Trips tab**

The Trip Dashboard appears.



**Trip Dashboard**

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



**Basic Information page**

3. Move through the workflow and make changes. Be sure to **Save** the changes before exiting a window or page.

4. 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.

- 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.