USCG UG26: Amending Authorizations

Changing Approved Travel Plans
Release 21.4 | November 2021

CWT SatoTravel

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1   Introduction

This document contains information regarding the authorization amendment process for E2 Solutions users utilizing both Federal Travel Regulations (FTR) and Joint Travel Regulations (JTR). Features and options specific to JTR functionality will be indicated when possible.

1.1   Understanding Travel Authorization Amendments

An authorization in E2 Solutions (E2) is a request to travel. Authorization amendments are changes to those requests.

While it is important to plan your trip carefully, there are times when you need to make changes. You can change your authorization at any time prior to submitting it for approval. After your trip request has been approved, you must amend the authorization to make any changes to the travel dates or destinations. You will also need to create an amendment to increase the funding, if you spend more than 10% over the total estimated expense amount approved for the original authorization.

This user guide covers amending approved travel authorizations, including TDY travel and trips created under an open or group authorization.

1.2   Why Amend an Authorization?

If your site details change or you spent more than 10% over the amount you were authorized to spend, you need to amend the authorization. For example, if your actual travel was shorter or longer than estimated on the authorization, you must amend the authorization to reflect the actual travel dates.

Amended authorizations require approval. Certain changes, however, can be made (if amendment limitations are not exceeded) without requiring additional approvals (e.g., returning a day earlier than originally planned).

1.3   When are Authorizations Available for Amendment?

Authorizations cannot be amended until they have been approved. E2 evaluates all relevant travel policies and settings to determine whether your authorization is available for amendment.

- If the authorization can be amended, the **Amend Authorization** button is enabled on the Trip Dashboard.
- If the **Amend Authorization** button is disabled and you need to amend the document, check the Trip Dashboard to verify that you have no trip documents pending approval.
- If no trip documents are pending approval and you still need to make changes to your authorization, consult your travel assist team on the next steps required to make your document available for amendment.

Trips created under an open (OA) or group authorization (GA) are also available for amendment. The process for these trips is the same as amending a standard authorization.

1.4   Amending a Dependent Travel Authorization

A dependent travel authorization is an authorization created for your dependents (children and spouse). It is identified when the traveler selects a travel type that allows for dependent travel (e.g., *EMERGENCY TRAVEL (P1)*, *EVACUATION DEPENDENT TVL (P1)*, *MEDICAL ATTENDANT/ESCORT (P1)*, OR *MEDICAL PATIENT(P1)*). As another type of simple travel authorization, a dependent travel authorization may also be amended.

When amending a dependent travel authorization, the following rules apply:

- You cannot make or retrieve reservations, or request reservation assistance using the **Travel Agent Assistance** link in the Other Actions section, for dependent travel within the E2 Solutions application. Travelers and travel arrangers are advised to contact their TMC directly for assistance with dependent travel reservations.
- Dependent travel is not eligible for a rental car at any destination site.

1.5 Amending an Authorization After Vouchers Have Been Approved or Closed

When you are on an extended trip, you may periodically file vouchers to be reimbursed for your expenses, even though you are still traveling. In some cases, you may need to amend an authorization for which you have already received a voucher reimbursement. For example, you are on a 60-day trip and you filed a voucher for 30 days of expenses. You were paid for those 30 days, but then you had to cut your trip short.

You can make changes to an authorization after a voucher has been approved or paid. The voucher that was paid, however, limits what you can change on the authorization – you cannot change anything for days covered by the already paid voucher. Using the previous example, if you started another voucher for the final 30 days, and it was considered open (i.e., in progress, not submitted) when you amended the authorization, that voucher is deleted. If you have a standalone travel advance that you started but did not submit for approval, it is also deleted.

1.6 Amendment Process

When you amend an authorization, the following actions are performed for the trip documents. After you make your changes, you must resubmit the authorization for approval. Depending on your changes, the document may be automatically approved or routed through the normal approval process.

1.6.1 Authorizations

- The original authorization is set with an *Amended* status.
- The status of the newly created authorization is set to *New Authorization*, if no reservations exist, or *Reservations Booked*, if reservations exist.
- The amendment number is appended to the trip ID.

  NOTE*: Amendments are sequentially numbered. The first amendment appends* -1 *to the trip ID, the second amendment appends* -2*, and so on.*

1.6.2 Vouchers

- Vouchers with a status of *Closed* or *Revised* (that have been interfaced with the financial system) are retained.
- All other vouchers are deleted.

1.6.2.1 T&O Expenses

E2 retains details of the transportation and other (T&O) expenses from the deleted voucher. After the amended authorization is approved and you begin another voucher, you can choose to use normal expense mapping processes to generate the T&O expenses for the new voucher, or you can choose to apply the T&O expenses from the deleted voucher to the new voucher. (This does not impact lodging expenses, meals and incidentals (M&IE), or transportation expenses, such as

airfare or rental car charges, that are derived from reservations associated with the trip.) The choice to use the T&O expenses is decided on the voucher's Basic Information step.

TIP: Refer to UG40 – Creating Vouchers *or* QRC41 – Managing Voucher Expenses After Amending an Authorization *for additional information*.

1.6.3   Travel Advances

- Advances with a status of *Closed* or *Canceled* are retained.
- All other advances are deleted.

1.6.4   Comparative Trips

If you have comparative trips associated with the authorization, when you amend the authorization, you can include the existing comparative trips with the amended authorization.

TIP: Refer to QRC90 – Adding Comparative Trips *for additional information*.

2   Amending an Authorization

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

1. Selecting the trip.
2. Making your changes.
3. Submitting the amended authorization for approval.

TIP: Refer to UG25 – Creating Authorizations *for more information on completing the authorization workflow.*

2.1   Overview of the Amendment Process

Complete the following steps to amend the authorization.

1. Select the trip to amend.
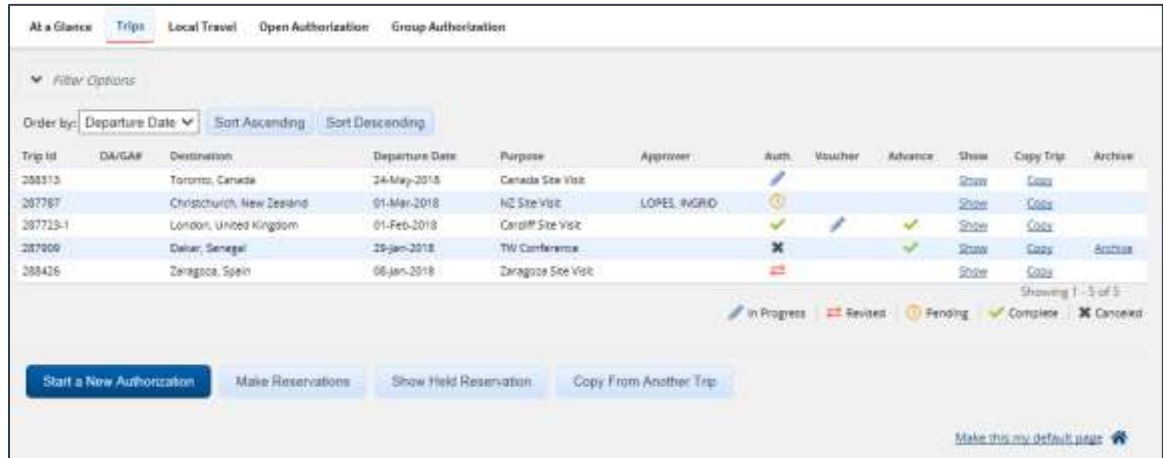   a. Click the My E2 **Trips** tab. This displays your trips list.

Figure 1: My E2 — Trips tab

    b. Locate the trip you want to amend in the list.
    c. Click the **Show** link. This displays the Trip Dashboard for that authorization.

    *TIP: If you are taken to the document workflow, click the **Trip Dashboard** tab to display the dashboard.*

Figure 2: Authorization — Trip Dashboard

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2. Click **Amend Authorization**. This displays the Basic Information page for the amended authorization.

   *TIP: If the authorization includes comparative trips, the Amend Authorization Confirm Action window displays. Click **Include Comparative Trips** to include the existing comparative trips with the amended authorization. Refer to* QRC90 – Adding Comparative Trips *for additional information.*

   Figure 3: Authorization — Basic Information page

3. Proceed through the workflow or click a specific step to make your changes.

   TIP: Be sure to save your changes before exiting a window or page.

4. When you are finished amending the authorization, click **Send to Approver** on the authorization's Summary page.

2.2   Completing the Basic Information Step

When you click **Amend Authorization** on the Trip Dashboard, the Basic Information page for that authorization displays. You can modify the following fields:

- Type of Travel
- Specific Travel Purpose

2.3   Completing the Reservations Step

As part of the amendment process, you may need to retrieve, change, add, or delete travel reservations.

NOTE: When an authorization has been amended, and the reservation has been removed or modified, the funding data will be removed from the reservation until the amendment is approved.

2.3.1 Change the Reservation

You can make changes to your reservation online if the reservations were made using the E2 online booking tool, **and** the reservations have not been ticketed.

TIP: The exception to this rule concerns rail reservations; rail reservations cannot be changed online. Contact your travel agent to make changes to rail reservations.

Complete the following steps.

1. Access the authorization's Reservation page.
2. Click the **Change Existing Reservation** link to the right of the item you want to change. This displays a Confirm Action window, alerting you that if you change or remove a reservation, you will not be able to delete the amended authorization.
3. Click **Confirm** to continue to the online booking tool and make changes to your reservation.
4. Once changes have been made in the online booking tool, click the **Confirm Changes** button on the "Trip review and checkout" page. You will be returned to the Reservation page in E2 Solutions and can continue through the amendment process.

If you contacted your travel management center (TMC) to make changes to a reservation already associated with the authorization, and travel has not yet started, click the **Refresh Reservation Details** link on the Reservation page to automatically update the page with the most current information for the reservation.

2.3.2 Add an Existing Reservation

Complete the following steps to add an existing reservation to your authorization.

1. Access the authorization's Reservation page.
2. Click the **Manage Trip Reservations** link. This displays the Manage Trip Reservations window.
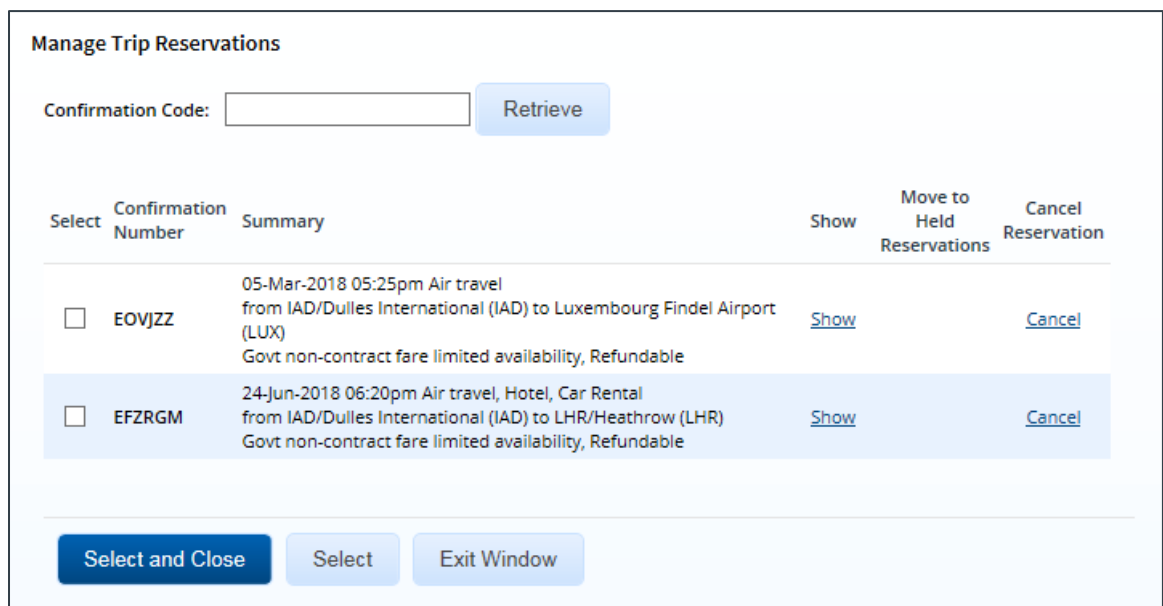

Figure 4: Manage Trip Reservations window

3. Click the **Select** check box for each reservation you want to add to the authorization.

4. Click **Select and Close** to add the selected reservation(s) to your authorization.

2.3.3   Associate an Agent-Assisted Reservation

If you requested agent assistance with a reservation, you must retrieve that reservation to associate it with your authorization. This ensures that your estimated expenses (e.g., airfare, rental car, and hotel costs) are automatically updated with the new reservation information. Complete the following steps.

1. Access the authorization's Reservation page.
2. Click the **Manage Trip Reservations** link. This displays the Manage Trip Reservations window.

Figure 5: Manage Trip Reservations — Confirmation Code field

3. Enter the reservation's confirmation code (also known as the passenger name record, or PNR) in the **Confirmation Code** field.
4. Click **Retrieve**. The reservation is added to a list below the field.
5. Click the **Select** check box for the reservation.
6. Click **Select and Close** to add the reservation to the amended authorization.

2.4   Completing the Site Details Step

Use the Site Details page to make changes to your trip per diem locations or travel detail information, including travel dates.

If the original authorization had associated reservations, the information on this page comes from those reservation details. If, however, you change the reservations during the amendment process, the Site Details page **does not** reflect that changed information. You will be alerted of this situation by a warning message.

You should always review the Site Details page to verify that it reflects your current travel plans, and that the dates and per diem location information is accurate.

- You cannot make changes for any dates for which you have been paid lodging, or meals and 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 not be eligible for the additional 25% M&IE (bringing the total M&IE to 100%).

NOTE: If you make changes that result in policy or system violations, you will receive errors when you try to save the information. You must correct any errors before proceeding.

2.5   Completing the Expenses Step

You should always estimate as many expenses as possible prior to travel. You can add new estimated expenses to your amended authorization or delete existing estimated expenses.

If you make changes to your travel itinerary or your reservations, you should always review your new estimated expenses and the selected reimbursement types, and review and verify the **Pay To** field selections.

- 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 clear 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.
- Changes to trip length or type of travel could result in changes to the applied per diem rates, if your group has enabled variable per diem rates for standard sites when the trip meets configured criteria.
- The maximum percentage by which actual lodging and meal expenses can exceed the per diem amount may be modified, provided the authorization does not have one closed voucher. If a closed voucher exists, the Actual Reimbursement Maximum value established with the original authorization will be carried forward to the amendment and any future vouchers, and the *Actual Reimbursement Maximum* **Modify** link will not display in the amended authorization's Lodging Expenses or Meals and Incidental Expenses windows.
- [JTR] When the **Reimbursement Type** field for at least one day in the Meals and Incidental Expenses window is set to *EUM* or *GMR/PMR*, the incidental amount allowed for the corresponding day may be modified (i.e., reduced, or returned to the original incidental per diem rate for the trip site), provided the authorization does not have one closed voucher. If a closed voucher exists, the Reduced Incidental Amount value from the original authorization will be carried forward to the amendment and any future vouchers, and the *Reduced Incidental Amount* **Modify** link will not display in the amended authorization's Meals and Incidental Expenses window.

2.6   Completing the Accounting Step

The Accounting page lists the POET/accounting codes selected by the Funds Manager on the original authorization. Click the **Save and Next Step** button to ensure the total amount of the trip is updated and continue with the amendment process.

2.7   Completing the Travel Policy Step

The Travel Policy page displays information about your trip that may be outside of your group's travel policy. It also displays contracted fare information for any city pairs that exist for your trip. (All listed fares are one-way fares.)

If any of your travel selections are considered out of policy, you must select explanations for the items should in the Travel Policy Justifications section.

2.8 View Amendment Changes

When you have finished with your changes, click the **View Amendment Changes** link in the Other Actions section on the Summary page to display the Amendment Changes Summary window. This window lists the differences between the current amendment and the original authorization / most recent amendment in a side-by-side comparison view.

The window includes the following information:

- **Trip Type** – Value selected from the **Type of Travel** drop-down list on the authorization's Basic Information page
- **Trip Duration** – Total length of the trip in days
- **Number Of Sites** – Number of sites included on the authorization's Site Details page
- **Mode Of Transportation (First Site)** – Value selected from the **Mode of Transportation** drop-down list for the first site on the Site Details page
- **Lodging Reimbursement Type** – *Per Diem*, if that option was selected as the reimbursement type for every day of lodging on the authorization; *Variable*, if a reimbursement type other than *Per Diem* was selected for at least one day on the authorization
- **M&IE Reimbursement Type** – *Per Diem*, if that option was selected as the reimbursement type for every day of M&IE on the authorization; *Variable*, if a reimbursement type other than *Per Diem* was selected for at least one day on the authorization
- **Account Code** – *Added*, if the current document contains an account code that was not on the previous version; *Deleted*, if the previous document contains an account code that is not on the current version; *Added/Deleted* if both the current and previous documents contain account codes not on the other version
- **Transportation Expenses** – Total of all transportation expenses, less any expenses for airfare, airline change fees, and unused tickets
- **Airfare Expenses** – Total of all airfare, airline change fees, and unused ticket expenses
- **Lodging Expenses** – Total of all lodging expenses
- **M&IE Expenses** – Total of all meals and incidental expenses
- **Other Expenses** – Total of all other expenses, less any voucher transaction fee expenses
- **Voucher Transaction Fee** – Amount of the voucher transaction fee (VTF)
- **Estimated Expense Total** – Total of all above expenses

Amendment Changes Summary		
Detail	954540	954540-1
Trip Type	Mission (Operational)	Mission (Operational)
Trip Duration	4 days	5 days
Number Of Sites	1	3
Mode Of Transportation (First Site)	Commercial Plane	Commercial Plane
Lodging Reimbursement Type	Per Diem	Per Diem
M&IE Reimbursement Type	Variable	Variable
Account Code		Added/Deleted
Transportation Expenses	0.00	0.00
Airfare Expenses	0.00	0.00
Lodging Expenses	288.00	661.00
M&IE Expenses	122.25	214.00
Other Expenses	0.00	47.00
Voucher Transaction Fee	20.00	20.00
Estimated Expense Total:	430.25 USD	942.00 USD

Exit Window

Figure 6: Amendment Changes Summary window

2.9 Submitting the Amended Authorization for Approval

When you have finished making your changes, the amended authorization must be submitted for approval. If the document is routed for approval, you will receive email notification as your authorization moves through the process.

2.9.1 Amended Authorizations from Group or Open Authorizations

Complete the following steps for amended authorizations created from a group (GA) or open authorization (OA).

1. Click **Complete Trip Authorization** on the amended authorization's Summary page. This displays a Confirm Action window.
2. Click **Confirm**.
   - If the amended authorization is within the GA or OA tolerances, it automatically inherits approval from the parent document, and a confirmation message displays
   - If the amended authorization exceeds tolerances, it is routed for approval.

2.9.2 Other Amended Authorizations

Complete the following steps for all other amended authorizations.

1. Click **Send to Approver** on the amended authorization's Summary page. This displays a Confirm Action window.

   *TIP: If the system identifies a problem with the amended authorization, the authorization's Summary page redisplays with an error message at the top. The message identifies the problems and the actions required to correct the amended authorization. After you make your corrections, click **Send to Approver** again.*

2. Click **Confirm**.

    - If the changes are within policy tolerances, the authorization receives automatic approval.

    - If the changes exceed policy tolerances, the authorization is routed for approval.

3. You can quickly review the status of your amendment via the My E2 **Trips** tab or within the Trip Dashboard. (Click the My E2 **Trips** tab, and then click the **Show** link for your trip.) The dashboard lists every document associated with trip, including the original authorization and any amendments you may have created for it.

Trip Dashboard

Traveler Name: CARLOS GARCIA   Trip ID: 328494-1

collapse or expand all sections

Authorizations

Begin Date	End Date	ID	Total Amount	Status	State	Show	Delete
14-Nov-2021	24-Nov-2021	328494-1	$3265.26	Approved - Obligation Accepted	✔	Show	
15-Nov-2021	24-Nov-2021	328494	$3030.26	Amended		Show	

Amend Authorization

Comparative Trips

Figure 7: Trip Dashboard — Authorizations section

TIP: *The most current version of the authorization displays at the top of the list.*

3   Deleting an Amendment

If you have not made reservation changes, you can delete an amendment at any point prior to submitting it for approval. Complete the following steps.

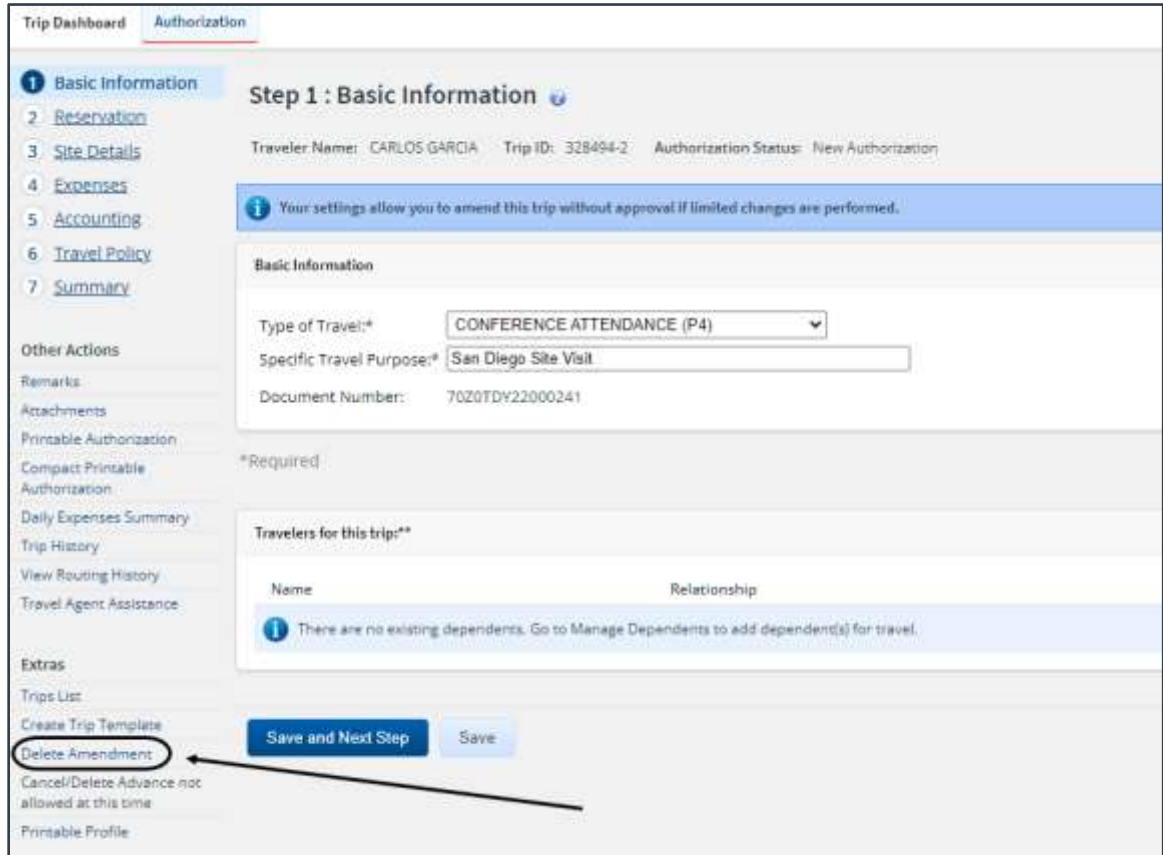1. Click the **Delete Amendment** link in the Extras section. This displays a Confirm Action window.

Figure 8: Authorization Workflow — Delete Amendment link

2. Click **Confirm**. The amendment is deleted, and the authorization returns to its previous status.

    NOTE: Any comparative trips that were added to the amended authorization are also deleted.

3.1   Trip Dashboard

If you saved an amendment and then exited the authorization workflow, without submitting the amendment for approval, you can also delete the amendment via the Trip Dashboard. Complete the following steps.

1. Click the My E2 **Trips** tab.
2. Locate the trip with the amendment you want to delete in the list, and then click the **Show** link. This displays the Trip Dashboard.
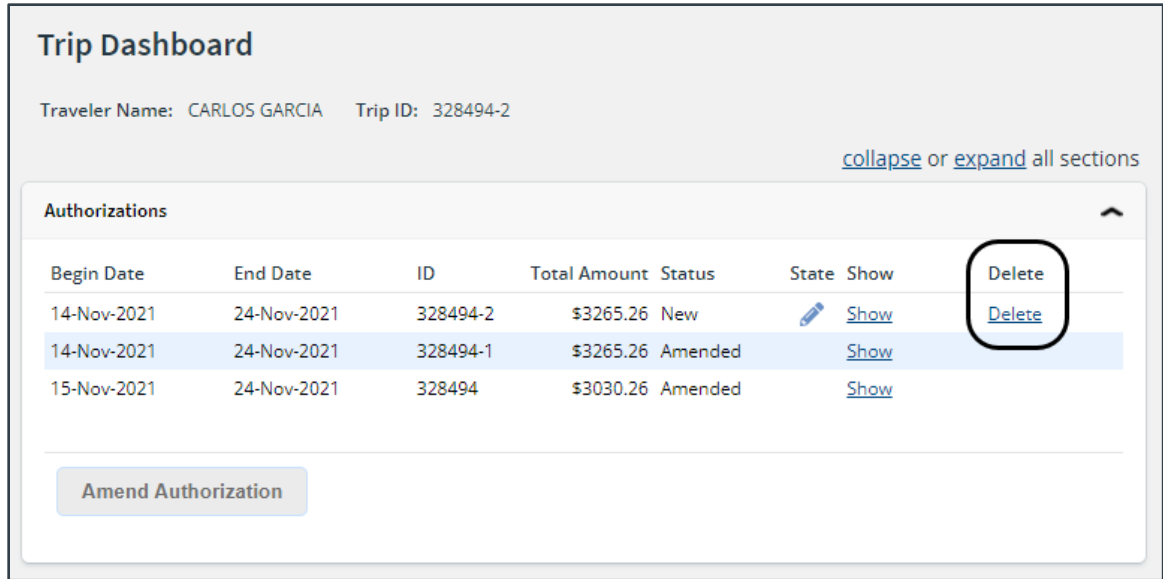
Figure 9: Trip Dashboard — Delete link

3. Click the **Delete** link for the amendment in the Authorizations section. This displays a Confirm Action window.

    *TIP: The Authorizations section lists every authorization associated with the trip, including the original document and any amendments you may have created for it. The **Delete** link will only be available for an authorization that has not yet been submitted for approval – typically the first document in the list.*

4. Click the **Confirm** button to delete the amendment, or click the **Cancel** button to cancel the request and leave the amendment unchanged.

4   Recalling an Amendment from the Approval Process

You can recall an amended authorization if you need to change the document after you submit it for approval, but before it completes the approval process. Recalling a document removes it from the approval process, and changes the document's status from *Pending Approval* to *Revised*. You can make any necessary changes, and then resubmit it for approval.

You can recall an amended authorization that is pending approval at any time until it receives final approval. Complete the following steps.

1. Locate the trip on the My E2 **Trips** tab.
2. Click **Show**. This displays the amended authorization's Summary page.

   *TIP: If the **Trip Dashboard** tab initially displays, locate the document in the Authorizations section, and then click **Show**.*
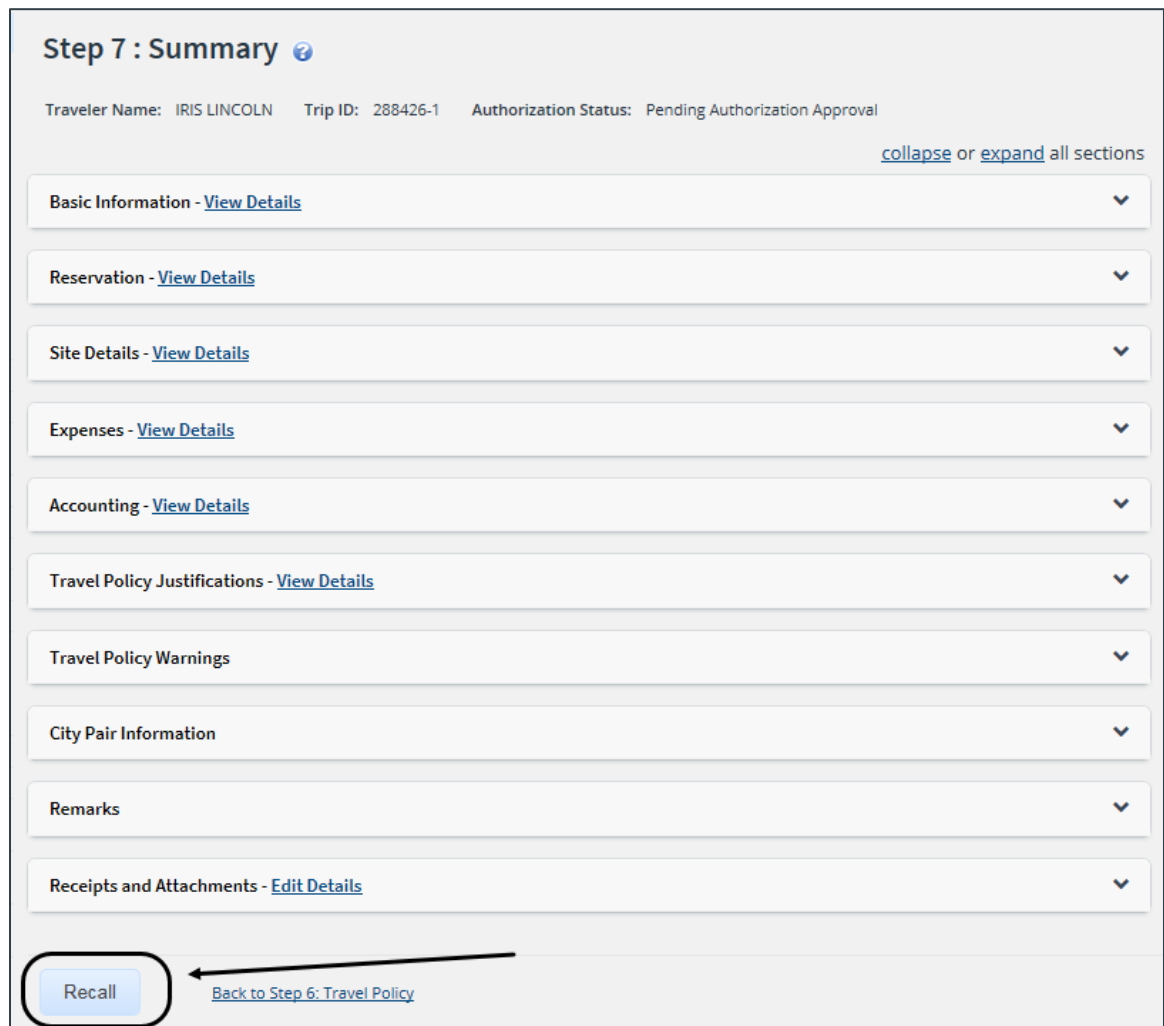

Figure 10: Authorization Summary — Recall button

3. Click **Recall**. This displays a Confirm Action window.
4. Click **Confirm**. The status of the document changes to *Revised*. Make your changes and then resubmit the amended authorization for approval.

5   Revision History

Date	Description	Release
11/2021	Document creation	21.4

6   Trademark and Copyright

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