

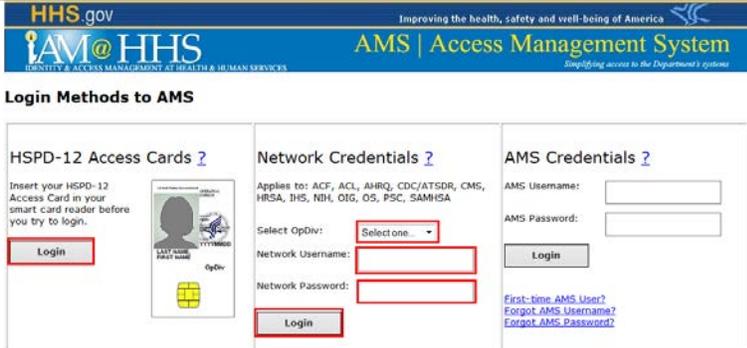
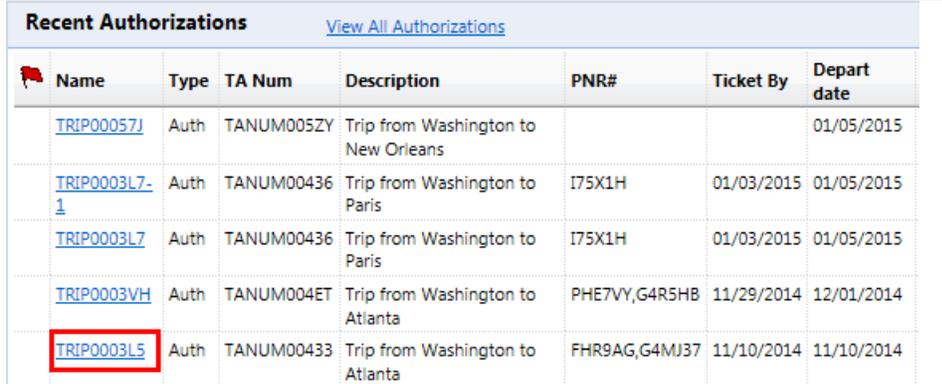


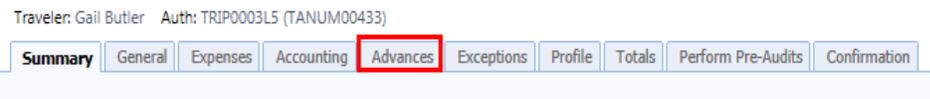
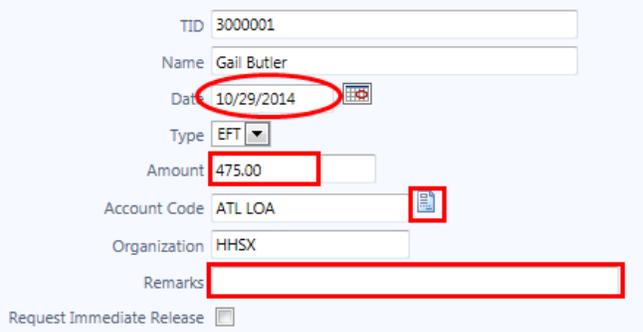
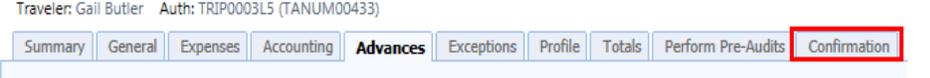
## Concur Government Edition (CGE) Job Aid: Adding an Advance Request to an Authorization

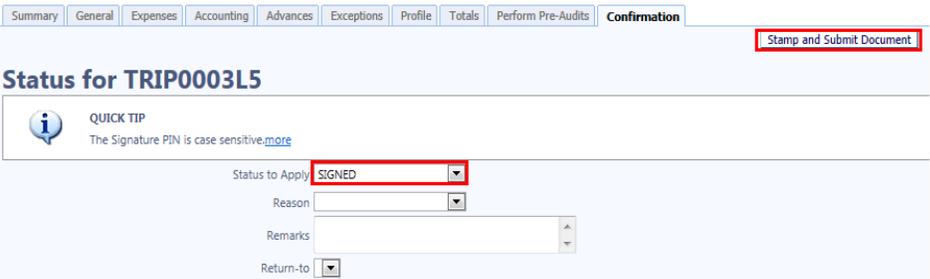
**Purpose:** To provide a step-by-step guide to adding a request for an advance to an Authorization.

**Note:** Before requesting an advance, be sure to set up the electronic funds transfer. See your FATA to make this arrangement.

**Audience:** Travelers and Preparers

Instruction:	Screenshot:																																										
<p><b>Step 1: Log into AMS</b> Log into CGE via AMS using either your PIV card or your network username and password.</p> <p>Note: AMS can be accessed through the HHS intranet or the internet at <a href="https://ams.hhs.gov">https://ams.hhs.gov</a></p>																																											
<p><b>Step 2: Select CGE</b> From the Home page of AMS select the E-Travel link.</p>																																											
<p><b>Step 3: Locate Authorization</b> From the CGE Home page, locate the appropriate Authorization in the Recent Authorization section. Select the document name under the Name column. You can also locate the Authorization by selecting the Authorizations tab at the top of the page (not shown).</p>	 <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>TA Num</th> <th>Description</th> <th>PNR#</th> <th>Ticket By</th> <th>Depart date</th> </tr> </thead> <tbody> <tr> <td><a href="#">TRIP00057J</a></td> <td>Auth</td> <td>TANUM005ZY</td> <td>Trip from Washington to New Orleans</td> <td></td> <td></td> <td>01/05/2015</td> </tr> <tr> <td><a href="#">TRIP0003L7-1</a></td> <td>Auth</td> <td>TANUM00436</td> <td>Trip from Washington to Paris</td> <td>I75X1H</td> <td>01/03/2015</td> <td>01/05/2015</td> </tr> <tr> <td><a href="#">TRIP0003L7</a></td> <td>Auth</td> <td>TANUM00436</td> <td>Trip from Washington to Paris</td> <td>I75X1H</td> <td>01/03/2015</td> <td>01/05/2015</td> </tr> <tr> <td><a href="#">TRIP0003VH</a></td> <td>Auth</td> <td>TANUM004ET</td> <td>Trip from Washington to Atlanta</td> <td>PHE7VY,G4R5HB</td> <td>11/29/2014</td> <td>12/01/2014</td> </tr> <tr> <td><a href="#">TRIP0003L5</a></td> <td>Auth</td> <td>TANUM00433</td> <td>Trip from Washington to Atlanta</td> <td>FHR9AG,G4MJ37</td> <td>11/10/2014</td> <td>11/10/2014</td> </tr> </tbody> </table>	Name	Type	TA Num	Description	PNR#	Ticket By	Depart date	<a href="#">TRIP00057J</a>	Auth	TANUM005ZY	Trip from Washington to New Orleans			01/05/2015	<a href="#">TRIP0003L7-1</a>	Auth	TANUM00436	Trip from Washington to Paris	I75X1H	01/03/2015	01/05/2015	<a href="#">TRIP0003L7</a>	Auth	TANUM00436	Trip from Washington to Paris	I75X1H	01/03/2015	01/05/2015	<a href="#">TRIP0003VH</a>	Auth	TANUM004ET	Trip from Washington to Atlanta	PHE7VY,G4R5HB	11/29/2014	12/01/2014	<a href="#">TRIP0003L5</a>	Auth	TANUM00433	Trip from Washington to Atlanta	FHR9AG,G4MJ37	11/10/2014	11/10/2014
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<p><b>Step 4: Open Authorization</b> From the Trip Actions pop up window select Edit Authorization.</p>																																											

<p><b>Instruction:</b></p>	<p><b>Screenshot:</b></p>						
<p><b>Step 5: Select Advances tab</b> Select the Advances tab.</p>	 <p>Traveler: Gail Butler Auth: TRIP0003L5 (TANUM00433)</p> <p>Summary   General   Expenses   Accounting   <b>Advances</b>   Exceptions   Profile   Totals   Perform Pre-Audits   Confirmation</p>						
<p><b>Step 6: Add Advances</b> Select the Add Advances button.</p>	 <p>View/Change Reservations   Submit   Print   Export   Close</p> <p><b>Add Advances</b>   Back   Next</p>						
<p><b>Step 7: Add Advance Details</b> In the Add Advance area, the date will default to the date of the request. The amount will default to the percentage of the trip cost set by your OpDiv/StaffDiv (usually 60% of the reimbursable amount). You may change this to a lower amount as needed. The Account Code will default to the Line of Accounting entered on the Accounting page. If you need to change the Account Code select the lookup icon and search for a new code. Enter any remarks for the Approving Official. Check the box next to Request Immediate Release if you need the advance processed as soon as the Authorization is approved.</p>	 <p>TID: 3000001</p> <p>Name: Gail Butler</p> <p>Date: 10/29/2014</p> <p>Type: EFT</p> <p>Amount: 475.00</p> <p>Account Code: ATL LOA</p> <p>Organization: HHSX</p> <p>Remarks:</p> <p>Request Immediate Release: <input type="checkbox"/></p>						
<p><b>Step 8: Save Advance</b> Select the Save button to save the advance request to the document.</p>	 <p>View/Change Reservations   Submit   Print   Export   Close</p> <p><b>Save</b>   Cancel</p>						
<p><b>Step 9: Review Pre-Audits</b> Select the Perform Pre-Audits tab to see if any items failed the pre-audit test. If any items show as FAIL in the status column, select the Justify Pre-Audit Results button to enter a justification.</p>	 <p>Traveler: Gail Butler Auth: TRIP0003L5 (TANUM00433)</p> <p>Summary   General   Expenses   Accounting   Advances   Exceptions   Profile   Totals   <b>Perform Pre-Audits</b>   Confirmation</p> <p>View/Change Reservations   Submit   Print   Export   Close</p> <p>Close Pre-Audit Results   <b>Justify Pre-Audit Results</b>   Back   Next</p> <p><b>Pre-Audit Results for TRIP0003L5</b></p> <p>Document Name: TRIP0003L5 Type: Auth Traveler: Butler, Gail Status: FAIL</p> <table border="1"> <thead> <tr> <th>Audit Process</th> <th>Status</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>ADVANCES EXIST</td> <td>FAIL</td> <td>CASH ADVANCES EXIST An advance has been added to your authorization. Please provide a justification for requesting an advance.</td> </tr> </tbody> </table>	Audit Process	Status	Comments	ADVANCES EXIST	FAIL	CASH ADVANCES EXIST An advance has been added to your authorization. Please provide a justification for requesting an advance.
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<p><b>Step 10: Enter Justification</b> Enter a justification for the failed pre-audit. Then select Save Justification.</p>	 <p>Summary   General   Expenses   Accounting   Advances   Exceptions   Profile   Totals   <b>Perform Pre-Audits</b>   Confirmation</p> <p>Close Justification Without Saving   <b>Save Justification</b>   Back   Next</p> <p>Document Name: TRIP0003L5 Type: Auth Traveler: Butler, Gail Status: FAIL</p> <table border="1"> <thead> <tr> <th>Audit Process</th> <th>Status</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>ADVANCES EXIST</td> <td>FAIL</td> <td>CASH ADVANCES EXIST An advance has been added to your authorization. Please provide a justification for requesting an advance.</td> </tr> </tbody> </table> <p>Justification: <input type="text" value="Cash advance requested to pay for meals and incidental expenses."/> Clear Justification</p>	Audit Process	Status	Comments	ADVANCES EXIST	FAIL	CASH ADVANCES EXIST An advance has been added to your authorization. Please provide a justification for requesting an advance.
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<p><b>Step 11: Select Confirmation Tab</b> Select the Confirmation tab to sign the Authorization.</p>	 <p>Traveler: Gail Butler Auth: TRIP0003L5 (TANUM00433)</p> <p>Summary   General   Expenses   Accounting   <b>Advances</b>   Exceptions   Profile   Totals   Perform Pre-Audits   <b>Confirmation</b></p>						

<b>Instruction:</b>	<b>Screenshot:</b>
<p><b>Step 12: Sign Authorization</b>  Select the SIGNED stamp in the Status to Apply drop down menu. Then select Stamp and Submit Document.  If this has previously been approved it will need to go through the routing process again to approve the advance.</p>	
<p><b>Step 13: Complete Signing Process</b>  Select the Continue Stamping the Document button.</p>	
<p><b>Step 14: Route the Document</b>  Select the Close Post Stamping Document Closure Screen button to close the Authorization and begin the routing process.</p>	

**You have successfully added an advance request to an Authorization in CGE!**