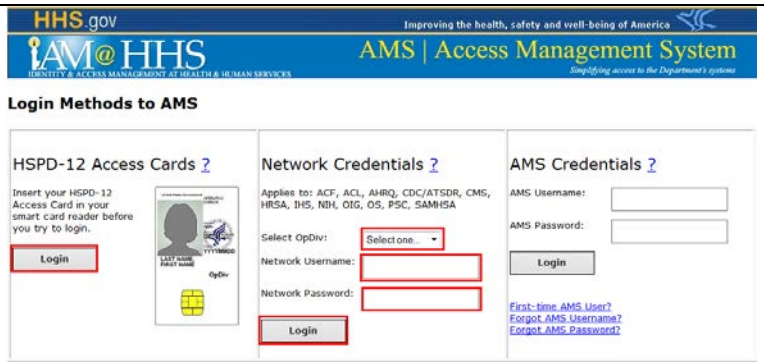
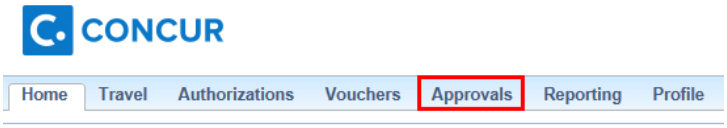
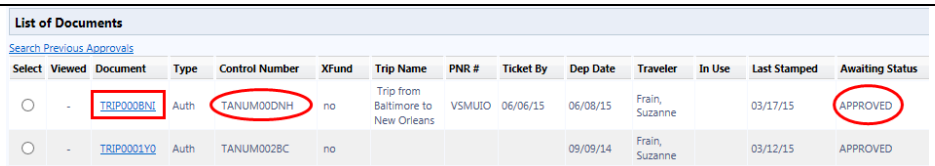
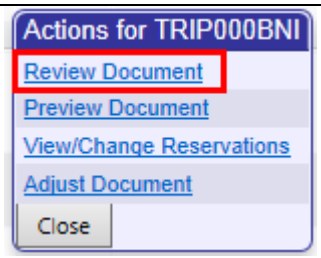
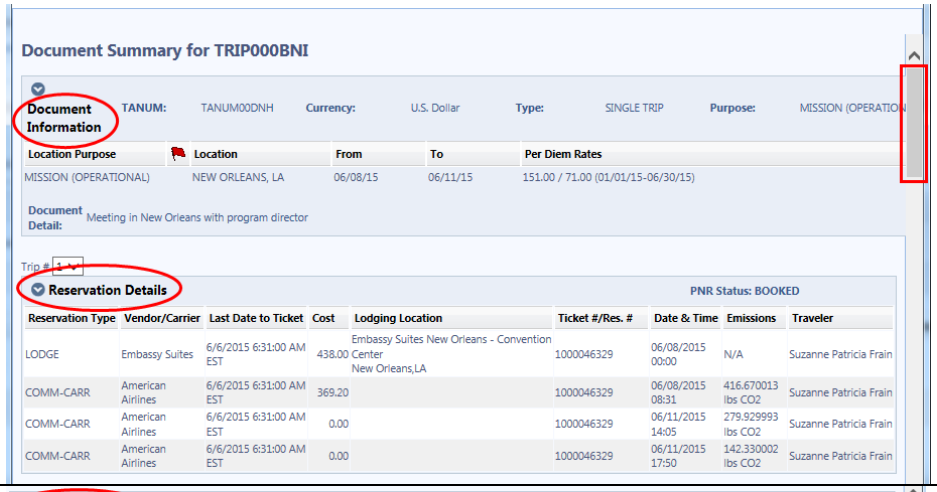
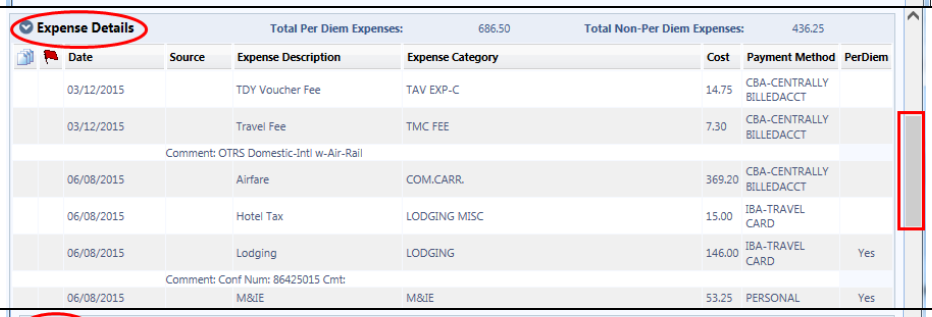
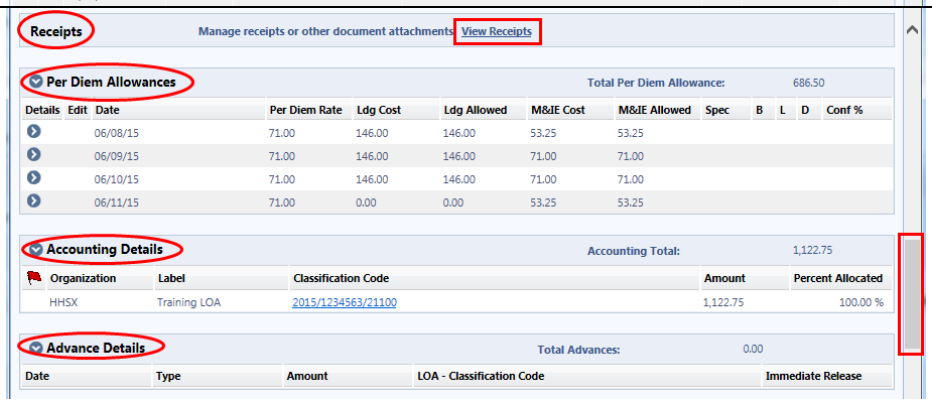
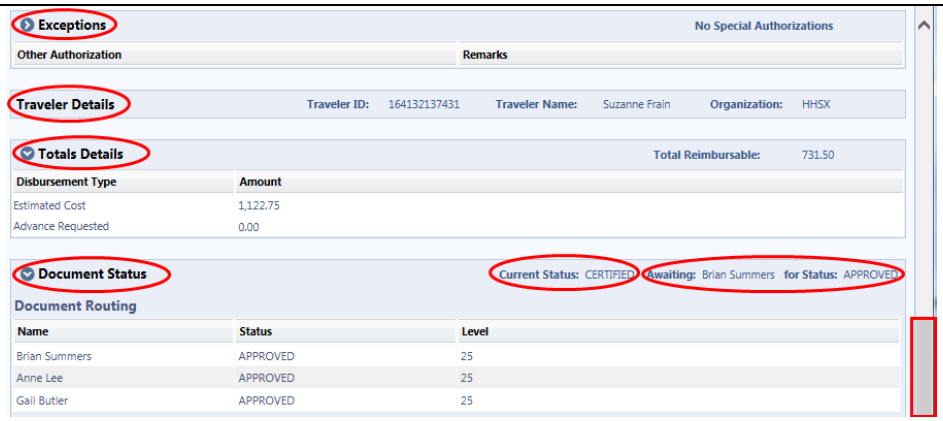
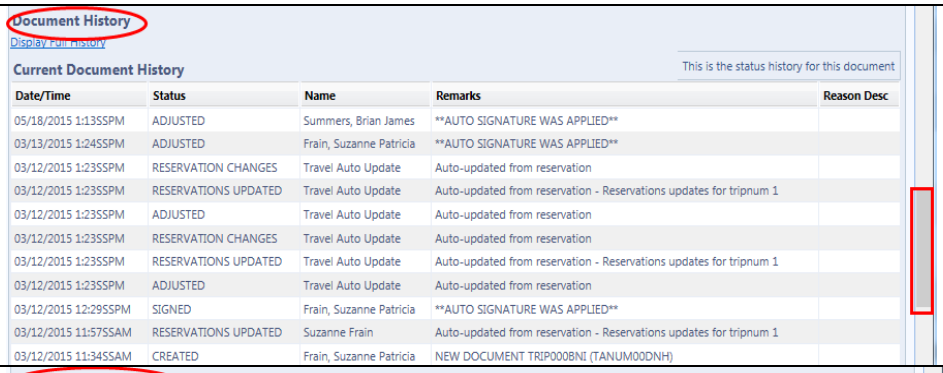
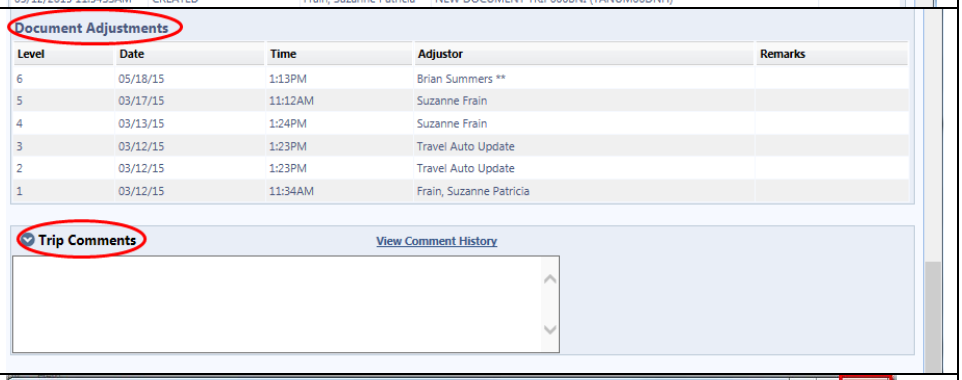
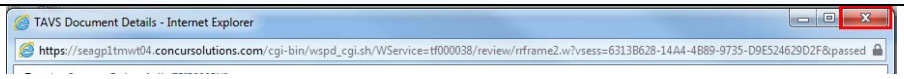
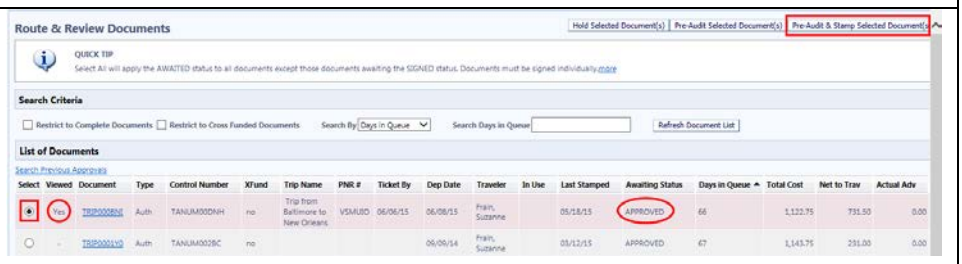
Concur Government Edition (CGE) Job Aid: Reviewing and Approving a Travel Document-Summary View Process.

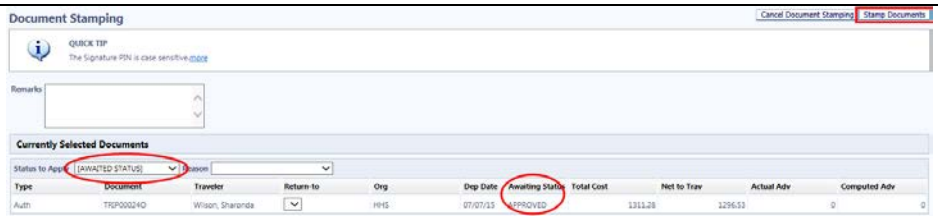
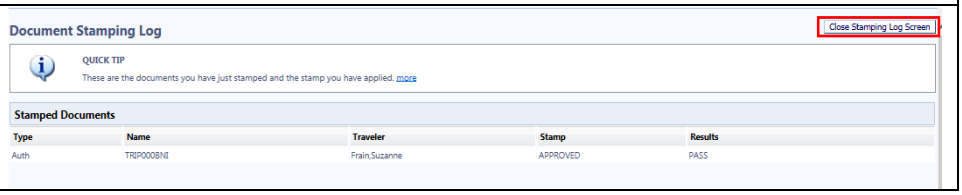
Purpose: To provide a step-by-step guide to reviewing and approving an Authorization or Voucher from a summary review page. This process allows you to stamp the document without making an adjustment to the document.

Audience: Approving/Routing Officials

Instruction:	Screenshot:
Step 1: Log into AMS Log into CGE via AMS using either your PIV card or your network username and password. Note: AMS can be accessed through the HHS intranet or the internet at https://ams.hhs.gov	
Step 2: Open CGE From the Home page of AMS select the E-Travel link.	
Step 3: Select Approvals Tab From the Home Page of CGE, select the Approvals tab to view all documents awaiting your approval.	
Step 4: Identify Document Identify the travel document that you need to approve by either the Document Name or the Control Number/TANUM. Notice the Awaiting Status column on the right. This indicates the next stamp to be applied to the document. Select the Document Name.	

Instruction:	Screenshot:
Step 5: Select Review Document In the "Actions for…" pop up window, select Review Document to see a summary page of the travel document. Note: The View/Change Reservation link will allow you to check for any policy violations on the travel reservation.	
Step 6: Review Document The Document Information section provides detail on the purpose and location of the trip. The Reservation Details section allows you to see the air, lodging, and rental car that have been booked for this trip. Select the scroll bar to see more.	
Step 7: Review Document continued The Expense Details section displays all of the expenses that have been applied to the document such as fees and per diem. Select the scroll bar to continue.	
Step 8: Review Document continued The Receipts section contains any receipts or documentation that has been attached to the document. Select the View Receipts link to see attachments. The Per Diem Allowances section shows the per diem for this TDY. The Accounting Details section displays the line(s) of accounting that will be used to fund the trip. The Advance Details section allows you to see if an advance has been requested for the Traveler. Select the scroll bar to continue.	

Instruction:	Screenshot:
Step 9: Review Document continued The Exceptions section will display any items outside the norm, e.g., non-contract fare used. The Traveler Details section displays the name, ID, and Org of the Traveler. The Total Details section shows the estimated cost of the trip as well as any requested advance. The Document Status section shows the current status, or last stamp to be applied to the document. It also shows the awaiting status, or next stamp to apply, and the routing officials that can apply that stamp. Select the scroll bar to continue.	 Exceptions — No Special Authorizations Other Authorization — Remarks Traveler Details — Traveler ID: 164132137431 — Traveler Name: Suzanne Frain — Organization: HHSX Totals Details — Total Reimbursable: 731.50 Disbursement Type — Amount Estimated Cost — 1,122.75 Advance Requested — 0.00 Document Status — Current Status: CERTIFIED — Awaiting: Brian Summers for Status: APPROVED Document Routing Name — Status — Level Brian Summers — APPROVED — 25 Anne Lee — APPROVED — 25 Gail Butler — APPROVED — 25
Step 10: Review Document continued The Document History section displays a complete history of this document including any adjustments, reservation updates, and stamps applied. Select the scroll bar to continue.	 Document History Display Full History Current Document History — This is the status history for this document Date/Time — Status — Name — Remarks — Reason Desc 05/18/2015 1:13SSPM — ADJUSTED — Summers, Brian James — **AUTO SIGNATURE WAS APPLIED** 03/13/2015 1:24SSPM — ADJUSTED — Frain, Suzanne Patricia — **AUTO SIGNATURE WAS APPLIED** 03/12/2015 1:23SSPM — RESERVATION CHANGES — Travel Auto Update — Auto-updated from reservation 03/12/2015 1:23SSPM — RESERVATIONS UPDATED — Travel Auto Update — Auto-updated from reservation - Reservations updates for tripnum 1 03/12/2015 1:23SSPM — ADJUSTED — Travel Auto Update — Auto-updated from reservation 03/12/2015 1:23SSPM — RESERVATION CHANGES — Travel Auto Update — Auto-updated from reservation 03/12/2015 1:23SSPM — RESERVATIONS UPDATED — Travel Auto Update — Auto-updated from reservation - Reservations updates for tripnum 1 03/12/2015 1:23SSPM — ADJUSTED — Travel Auto Update — Auto-updated from reservation 03/12/2015 12:29SSPM — SIGNED — Frain, Suzanne Patricia — **AUTO SIGNATURE WAS APPLIED** 03/12/2015 11:57SSAM — RESERVATIONS UPDATED — Suzanne Frain — Auto-updated from reservation - Reservations updates for tripnum 1 03/12/2015 11:34SSAM — CREATED — Frain, Suzanne Patricia — NEW DOCUMENT TRIP000BNI (TANUM00DNH)
Step 11: Review Document continued The Document Adjustments section shows the history of adjustments made on the document. The Trip Comments section displays comments added by the Preparer or Traveler.	 Document Adjustments Level — Date — Time — Adjustor — Remarks 6 — 05/18/15 — 1:13PM — Brian Summers ** 5 — 03/17/15 — 11:12AM — Suzanne Frain 4 — 03/13/15 — 1:24PM — Suzanne Frain 3 — 03/12/15 — 1:23PM — Travel Auto Update 2 — 03/12/15 — 1:23PM — Travel Auto Update 1 — 03/12/15 — 11:34AM — Frain, Suzanne Patricia Trip Comments — View Comment History
Step 12: Close Review Window When you have finished your review of the document, select the red X in the upper right to close the window.	 TAVS Document Details - Internet Explorer https://seagp1tmwt04.concursolutions.com/cgi-bin/wspd_cgi.sh/WService=tf000038/review/rrframe2.w?vsess=6313B628-14A4-4B89-9735-D9E524629D2F&passed
Step 13: Stamp Document Now that you have reviewed the document, the status in the Viewed column changes to Yes. Select the radio button in the Select column and then select the Pre-Audit and Stamp Selected Document button in the upper right to begin stamping the document.	 Route & Review Documents Hold Selected Document(s) — Pre-Audit Selected Document(s) — Pre-Audit & Stamp Selected Document(s) Search Criteria List of Documents Select — Viewed — Document — Type — Control Number — XFund — Trip Name — PNR # — Ticket By — Dep Date — Traveler — In Use — Last Stamped — Awaiting Status — Days in Queue — Total Cost — Net to Trav — Actual Adv Yes — TRIP000BNI — Auth — TANUM00DNH — no — Trip from Baltimore to New Orleans — VSMUBD — 06/06/15 — 06/08/15 — Frain, Suzanne — 05/18/15 — APPROVED — 66 — 1,122.75 — 731.50 — 0.00 TRIP000LVG — Auth — TANUM002BC — no — 06/09/14 — Frain, Suzanne — 03/12/15 — APPROVED — 67 — 1,143.75 — 231.00 — 0.00

Instruction:	Screenshot:
Step 14: Review Pre-Audit Results Check for any failed pre-audits. Select the Continue Signing Document button. Note: The Review page does not display justifications for the failed pre-audits. To see justifications, either adjust the document per the link on Step 5 or see the email notification for this document.	
Step 15: Stamp Document The Status to Apply field indicates that the next stamp to apply to the document is the one that appears in the Awaiting Status column. Select the Stamp Document button to continue. Note: If, for some reason, you need to return this document to the Traveler or Preparer, select the Status to Apply drop down arrow and choose the RETURNED stamp. Then choose a reason in the Reason drop down menu.	
Step 16: Close Document Select the Close Stamping Log Screen to finalize.	

You have successfully reviewed and approved a travel document in CGE!