

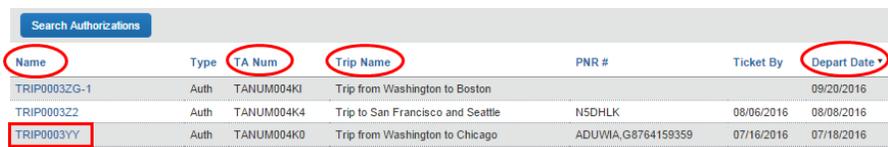


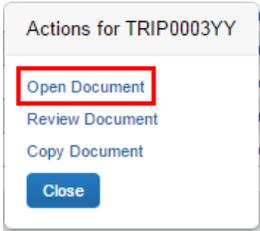
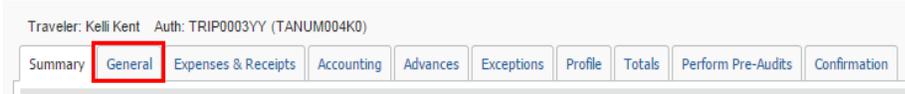
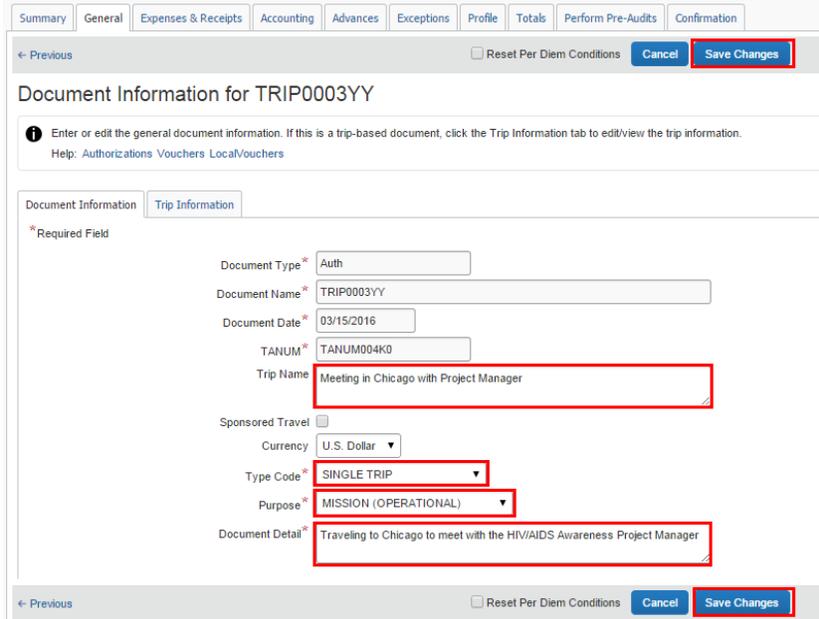
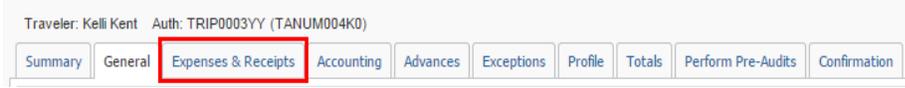
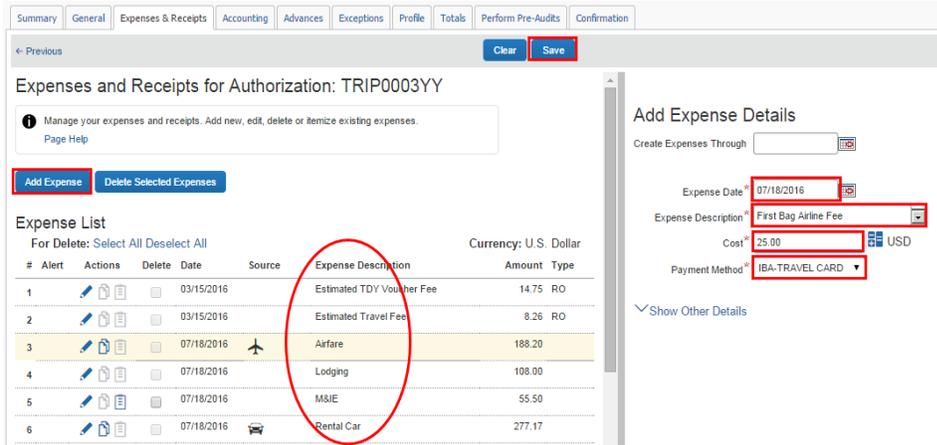
## ConcurGov Job Aid: Creating an Authorization from a Travel Reservation

**Purpose:** To provide a step-by-step guide to creating an Authorization after creating a travel reservation in ConcurGov.

To learn how to create a travel reservation, see the job aid entitled “Creating a Travel Reservation”.

**Audience:** Travelers and Federal Travel Arrangers

Instruction:	Screenshot:																												
<p><b>Step 1: Log into AMS</b> Log into ConcurGov via AMS using either your PIV card or your HHS network username and password. If you have just created a travel reservation and have not logged out of ConcurGov, skip to step 6.</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 ConcurGov</b> From the Home page of AMS select the E-Travel link.</p>																													
<p><b>Step 3: Select Authorization Tab</b> An Authorization was automatically created when you booked travel. To locate it, select the Authorization tab from the ConcurGov Home page.</p>																													
<p><b>Step 4: Locate Authorization</b> From the list of Authorizations, locate the document based on the Name, TA number, Trip Name, and/or Depart Date. Select the document Name.</p>	 <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>TA Num</th> <th>Trip Name</th> <th>PNR #</th> <th>Ticket By</th> <th>Depart Date</th> </tr> </thead> <tbody> <tr> <td>TRIP00032G-1</td> <td>Auth</td> <td>TANUM004KI</td> <td>Trip from Washington to Boston</td> <td></td> <td></td> <td>09/20/2016</td> </tr> <tr> <td>TRIP000322</td> <td>Auth</td> <td>TANUM004K4</td> <td>Trip to San Francisco and Seattle</td> <td>N5DHLK</td> <td>08/06/2016</td> <td>08/08/2016</td> </tr> <tr> <td>TRIP0003YY</td> <td>Auth</td> <td>TANUM004K0</td> <td>Trip from Washington to Chicago</td> <td>ADUWJA,G8764159359</td> <td>07/16/2016</td> <td>07/18/2016</td> </tr> </tbody> </table>	Name	Type	TA Num	Trip Name	PNR #	Ticket By	Depart Date	TRIP00032G-1	Auth	TANUM004KI	Trip from Washington to Boston			09/20/2016	TRIP000322	Auth	TANUM004K4	Trip to San Francisco and Seattle	N5DHLK	08/06/2016	08/08/2016	TRIP0003YY	Auth	TANUM004K0	Trip from Washington to Chicago	ADUWJA,G8764159359	07/16/2016	07/18/2016
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<p><b>Instruction:</b></p> <p><b>Step 5: Open Authorization</b> From the "Actions for..." pop up window, select Open Document.</p>	<p><b>Screenshot:</b></p> 																																																															
<p><b>Step 6: Select General Tab</b> Select the General tab to enter general information about this trip.</p>																																																																
<p><b>Step 7: Enter General Information</b> From the General tab, enter a Trip Name if you did not create one while booking the reservation. Enter the Type Code, Purpose, and Document Details of the trip. The select the Save Changes button.</p>																																																																
<p><b>Step 8: Select Expenses Tab</b> Select the Expenses &amp; Receipts tab to enter the estimated expenses for this trip.</p>																																																																
<p><b>Step 9: Add Expenses</b> Expenses for Airfare, Lodging, and Rental Car have already been added from your travel reservation. The Meals and Incidental Expenses (M&amp;IE) have also been added per the TDY location. To add an expense, select the Add Expense button on the left and then enter the Expense Description, Cost, Payment Method, and Expense Date in the Add Expense Details section on the right side of the page. Then select the Save button.</p> <p>Note: Be sure to select the Add Expense button before each entry to avoid editing a previously entered expense.</p>	 <table border="1" data-bbox="602 1665 1198 1896"> <caption>Expense List</caption> <thead> <tr> <th>#</th> <th>Alert</th> <th>Actions</th> <th>Delete</th> <th>Date</th> <th>Source</th> <th>Expense Description</th> <th>Amount</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td></td> <td></td> <td>03/15/2016</td> <td></td> <td>Estimated TDY Voucher Fee</td> <td>14.75</td> <td>RO</td> </tr> <tr> <td>2</td> <td></td> <td></td> <td></td> <td>03/15/2016</td> <td></td> <td>Estimated Travel Fee</td> <td>8.26</td> <td>RO</td> </tr> <tr> <td>3</td> <td></td> <td></td> <td></td> <td>07/18/2016</td> <td>✈️</td> <td>Airfare</td> <td>188.20</td> <td></td> </tr> <tr> <td>4</td> <td></td> <td></td> <td></td> <td>07/18/2016</td> <td></td> <td>Lodging</td> <td>108.00</td> <td></td> </tr> <tr> <td>5</td> <td></td> <td></td> <td></td> <td>07/18/2016</td> <td></td> <td>M&amp;IE</td> <td>55.50</td> <td></td> </tr> <tr> <td>6</td> <td></td> <td></td> <td></td> <td>07/18/2016</td> <td>🚗</td> <td>Rental Car</td> <td>277.17</td> <td></td> </tr> </tbody> </table>	#	Alert	Actions	Delete	Date	Source	Expense Description	Amount	Type	1				03/15/2016		Estimated TDY Voucher Fee	14.75	RO	2				03/15/2016		Estimated Travel Fee	8.26	RO	3				07/18/2016	✈️	Airfare	188.20		4				07/18/2016		Lodging	108.00		5				07/18/2016		M&IE	55.50		6				07/18/2016	🚗	Rental Car	277.17	
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**Instruction:**

**Step 10: Edit an Expense**

To edit an expense, select the edit icon on the left side of the expense.

Edit the cost or payment method fields and select Save. In this example, to edit the M&IE, select the Show Per Diem Conditions link.

**Screenshot:**

Traveler: Kelli Kent Auth: TRIP0003YY (TANUM004K0)

Summary General Expenses & Receipts Accounting Advances Exceptions Profile Totals Perform Pre-Audits Confirmation

Line	Date	Description	Amount
4	07/18/2016	First Bag Airline Fee	25.00
5	07/19/2016	Hotel Tax	25.00
6	07/18/2016	Lodging	108.00
7	07/18/2016	M&IE	55.50
8	07/18/2016	Privately Owned Vehicle	12.42
9	07/19/2016	Rental Car	277.17
10	07/19/2016	Hotel Tax	25.00
11	07/19/2016	Lodging	108.00
12	07/19/2016	M&IE	74.00
13	07/20/2016	Hotel Tax	25.00
14	07/20/2016	Lodging	108.00
15	07/20/2016	M&IE	74.00

**Edit Expense Details**  
Copy Per Diem Expense Values and Conditions

Create Expenses Through [ ]

Expense Date\* 07/19/2016

Expense Description\* M&IE

Cost\* 74.00 USD

Payment Method\* PERSONAL

Show Other Details

Show Per Diem Conditions Per Diem Rates: 200.00 / 74.00

**Step 10 continued: Edit an Expense**

Select the radio button next to Meals Provided and check the appropriate box next to Breakfast, Lunch, and/or Dinner.

Enter an end date in the Copy Per Diem Conditions Through field if this applies to multiple consecutive dates.

Select Save to complete.

Continue to add all estimated expenses for this trip.

Save Next ->

**Edit Expense Details**  
Copy Per Diem Expense Values and Conditions

Create Expenses Through [ ]

Expense Date\* 07/19/2016

Expense Description\* M&IE

Cost\* 58.00 USD

Payment Method\* PERSONAL

Show Other Details

Hide Per Diem Conditions Per Diem Rates: 200.00 / 74.00  
These conditions apply to all per diem expenses on 07/19/2016

Regular M&IE  
 Meals Provided  
 Breakfast  
 Lunch  
 Dinner  
 Actual Meals  
 M&IE Overtime  
 On Leave

Save Next ->

**Step 11: Select Accounting Tab**

Select the Accounting tab to enter the accounting information for this trip.

Traveler: Kelli Kent Auth: TRIP0003YY (TANUM004K0)

Summary General Expenses & Receipts Accounting Advances Exceptions Profile Totals Perform Pre-Audits Confirmation

**Step 12: Add a Line of Accounting (LOA)**

Select the Add New Account Code button.

Traveler: Kelli Kent Auth: TRIP0003YY (TANUM004K0)

Summary General Expenses & Receipts Accounting Advances Exceptions Profile Totals Perform Pre-Audits Confirmation

Account Code for TRIP0003YY

To select an account code, click the Label link. To search by label, type some of the label in the field and click the Search button.

Account Organization: HHS

Add New Account Code

**Instruction:**

**Step 13: Enter LOA Label and Fiscal Year**

Enter a Label for this LOA based on your OpDiv/StaffDiv guidelines. The Fiscal Year field reflects the year that the document is created. Choose the fiscal year of the trip expenses in the FY drop down. Search for a Common Account Number (CAN) by selecting the magnifying glass icon. This could also appear as a drop down arrow depending on your OpDiv/StaffDiv configuration.

Note: There may be additional fields depending on your OpDiv/StaffDiv configuration.

**Screenshot:**

**Step 14: Choose the Common Account Number (CAN)**

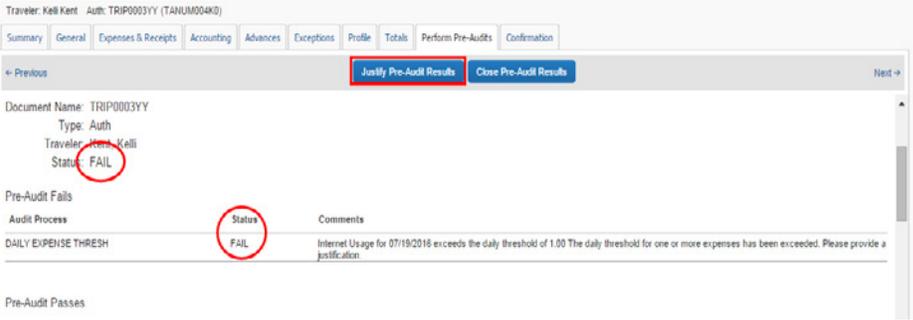
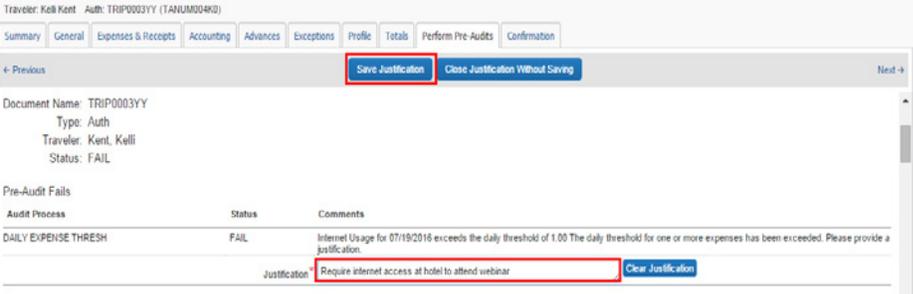
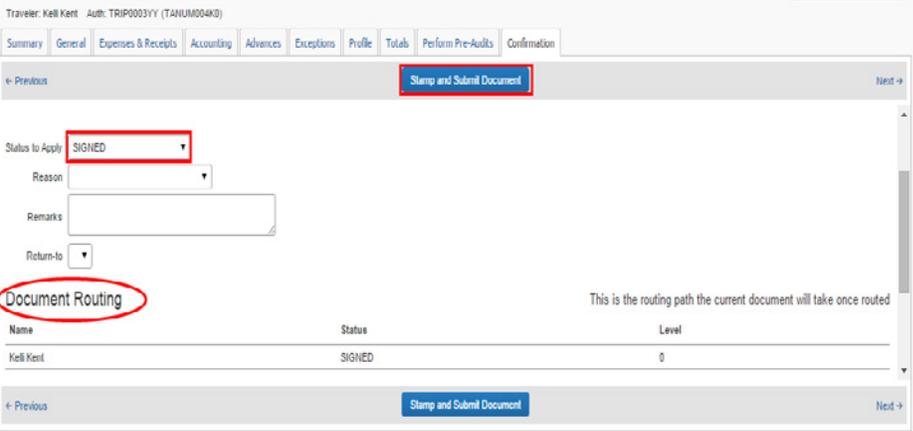
Search for the appropriate CAN by selecting the radio button next to either the By Element Description or the By Element Value fields. Enter the description or CAN number in the Search Value field and select Search. Select the CAN from the Search Results list.

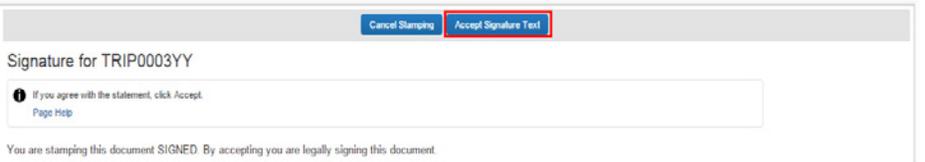
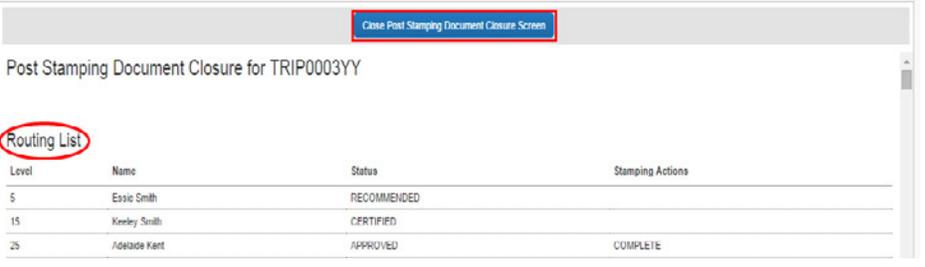
**Step 15: Choose the Object Class Code (OCC)**

Follow the same process as above to search for and select the Object Class Code. Then select the Add to Document button.

**Step 16: Perform Pre-Audit Check**

Select the Perform Pre-Audits tab to verify audit tests.

<p><b>Instruction:</b></p> <p><b>Step 17: Identify Pre-Audit FAILS</b> Check for any FAILS on the Pre-Audit List. These require a justification. Select the Justify Pre-Audit Results stamp to enter the justification.</p> <p>Note: A HARDFAIL (not shown) requires an adjustment to the document in order to proceed.</p>	<p><b>Screenshot:</b></p>  <p>The screenshot shows the 'Pre-Audit List' for document TRIP0003YY. The 'DAILY EXPENSE THRESH' row has a status of 'FAIL', which is circled in red. The 'Justify Pre-Audit Results' button is also circled in red.</p>
<p><b>Step 18: Enter Justification</b> Enter a justification, per your OpDiv/StaffDiv guidelines, in the comment box next to the failed pre-audit. Select the Save Justification button to continue.</p>	 <p>The screenshot shows the 'Justification' field for the failed pre-audit. The text 'Require internet access at hotel to attend webinar' is entered and highlighted with a red box. The 'Save Justification' button is also circled in red.</p>
<p><b>Step 19: Select Confirmation Tab</b> Select the Confirmation tab to sign the document.</p>	 <p>The screenshot shows the document navigation tabs. The 'Confirmation' tab is highlighted with a red box.</p>
<p><b>Step 20: Sign Authorization</b> Select the SIGNED stamp from the drop down menu next to Status to Apply. Select the Stamp and Submit Document button to continue.</p> <p>Note: An Arranger may choose the AUTH PREPARED stamp if the Authorization needs to be sent to the Traveler for verification. Check with your FATA for OpDiv/StaffDiv guidelines on this process.</p> <p>The Document Routing section lists the current status of the document.</p>	 <p>The screenshot shows the 'Stamp and Submit Document' screen. The 'Status to Apply' dropdown is set to 'SIGNED' and circled in red. The 'Document Routing' section is also circled in red, showing the current routing path.</p>
<p><b>Step 21: Review Pre-Audits</b> Review the pre-audits to verify that all justifications have been provided. Select the Continue Stamping the Document button to complete.</p>	 <p>The screenshot shows the 'Pre-Audit Results' for document TRIP0003YY. The 'Continue Stamping the Document' button is highlighted with a red box.</p>

<p><b>Instruction:</b></p> <p><b>Step 22: Accept Signature</b>  Select the Accept Signature Text button to indicate that you are legally signing this document.</p>	<p><b>Screenshot:</b></p>  <p>The screenshot shows a web application interface for 'Signature for TRIP0003YY'. At the top, there are two buttons: 'Cancel Stamping' and 'Accept Signature Text'. The 'Accept Signature Text' button is highlighted with a red box. Below the buttons, there is a text area with a warning icon and the text: 'If you agree with the statement, click Accept. Page Hop'. At the bottom, there is a message: 'You are stamping this document SIGNED. By accepting you are legally signing this document.'</p>																
<p><b>Step 23: Close and Route Authorization</b>  Select the Close Post Stamping Document Closure Screen button to close the Authorization and begin the routing process.</p>	<p><b>Screenshot:</b></p>  <p>The screenshot shows a web application interface for 'Post Stamping Document Closure for TRIP0003YY'. At the top, there is a button labeled 'Close Post Stamping Document Closure Screen' highlighted with a red box. Below the button, there is a section titled 'Routing List' circled in red. Underneath is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Level</th> <th>Name</th> <th>Status</th> <th>Stamping Actions</th> </tr> </thead> <tbody> <tr> <td>5</td> <td>Essie Smith</td> <td>RECOMMENDED</td> <td></td> </tr> <tr> <td>15</td> <td>Kneley Smith</td> <td>CERTIFIED</td> <td></td> </tr> <tr> <td>25</td> <td>Adelaide Kent</td> <td>APPROVED</td> <td>COMPLETE</td> </tr> </tbody> </table>	Level	Name	Status	Stamping Actions	5	Essie Smith	RECOMMENDED		15	Kneley Smith	CERTIFIED		25	Adelaide Kent	APPROVED	COMPLETE
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**You have successfully created an Authorization from a travel reservation in ConcurGov!**