



UG26: Amending Authorizations

Changing Approved Travel Plans
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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. Additionally, many FTR and JTR features and functionality may be subject to your agency's configurations.

2 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 typically need to amend the authorization to make any changes.

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

2.1 Why Amend an Authorization?

If any information other than your expenses changes, or if your agency's travel policy requires your estimated expenses to match the voucher expenses, 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. Some agencies, however, allow certain changes to be made (if amendment limitations are not exceeded) without requiring additional approvals.

***TIP:** Some workgroups allow you to make itinerary changes on a final voucher, rather than amending the authorization, if your travel plans changed during the trip. Refer to QRC42 – Changing Itinerary on Final Vouchers for more information.*

2.2 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 policy manager 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.

2.3 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., *Dependent Travel*). 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 from your Travel Management Center (TMC).
- Dependent travel is not eligible for a rental car at any destination site.

2.4 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.

If your travel policy allows it, 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.

Contact your travel policy manager to see if this function is enabled for your financial system.

2.5 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.

2.5.1 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.

2.5.2 Vouchers

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

2.5.2.1 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.

2.5.3 Advances

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

2.5.4 Reservations Made After Authorization Approval

If the authorization contains a reservation made after the original authorization was approved (post-authorization reservation, or PARC), that reservation remains associated with the amended trip.

2.5.5 Comparative Trips

If your travel policy supports optional trip scenarios for cost comparison, you may 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.

3 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.

3.1 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.

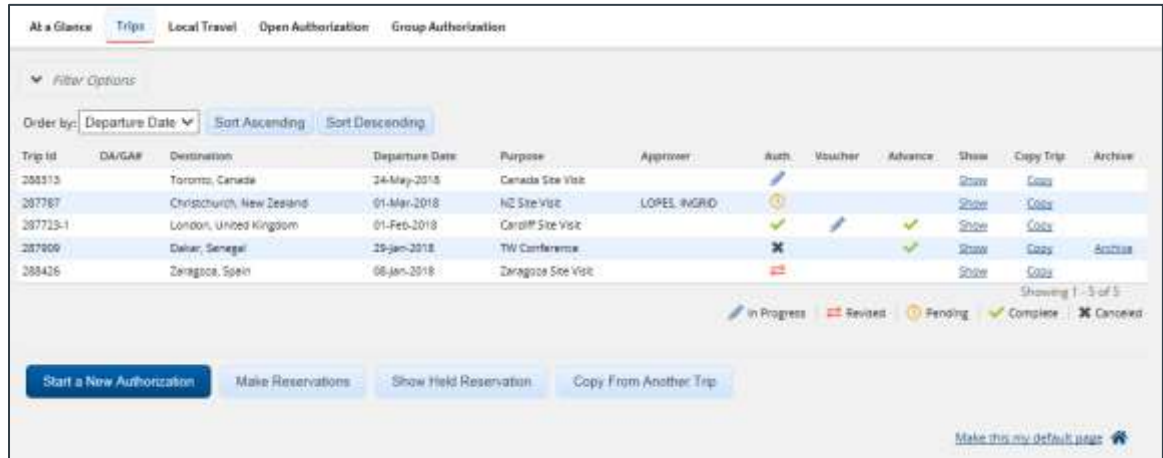


Figure 1: My E2 — Trips tab

- 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

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.

Step 1 : Basic Information ?

Traveler Name: IRIS LINCOLN Trip ID: 287723-1 Authorization Status: Reservations Booked

i Your settings allow you to amend this trip without approval if limited changes are performed.

Basic Information

Type of Travel:* Site Visit

Specific Travel Purpose:* Cardiff Site Visit

Document Number: TWMNR0000287723T

*Required

Save and Next Step Save

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.

3.2 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

3.2.1 Tax Effective Date

The **Tax Effective Date** field displays on the Basic Information page when you are amending the authorization if the long-term taxable travel feature is enabled for your office or workgroup and the trip qualifies.

TIP: A trip is considered long-term taxable travel when the duration is greater than 365 days, the travel type selected for the trip allows tax calculations, and the traveler is traveling under the Federal Travel Regulations (FTR).

The **Tax Effective Date** field is used to determine from which date taxes are calculated, and is set based on whichever is earlier: the trip start date or today’s date. Any expense with an expense date greater than or equal to the effective date will be included in the tax calculations.

- If long-term taxable travel was applicable with a previous version of the authorization, when the authorization is amended, the **Tax Effective Date** field is read-only and displays the date set with that previous version.

Step 1 : Basic Information ⓘ

Traveler Name: ALICE CG AUBURN Trip ID: 1051171-1 Authorization Status: New Authorization

Basic Information

Type of Travel:* Mission (Operational) ▾

Specific Travel Purpose:* Extended Stay - Req. met on original

Tax Effective Date: 27-Jul-2021 ←

Document Number: 70ZOTDY21000021

Figure 4: Authorization Basic Information — Tax Effective Date, Read-Only

NOTE: The **Tax Effective Date** field will never display on the Basic Information page of the original authorization, even if that version of the authorization qualified for long-term taxable travel. It will only be visible when the authorization is amended.

- If long-term taxable travel did not apply to a previous version of the authorization, but becomes applicable with the amendment, the **Tax Effective Date** field is added to the Basic Information page. The field defaults to today’s date, but you can enter a different date in the field (i.e., one that is less than or equal to today’s date), or click the calendar icon to select a date from the drop-down calendar.

TIP: The **Tax Effective Date** field is only enabled and editable on the authorization amendment until the amendment is approved. Once approved, the **Tax Effective Date** field will be read-only. Even if you choose to again amend the authorization, the **Tax Effective Date** field will remain disabled.


Step 1 : Basic Information ⓘ

Traveler Name: ALICE CG AUBURN Trip ID: 1051162-1 Authorization Status: New Authorization

Basic Information

Type of Travel:* Mission (Operational) ▼

Specific Travel Purpose:* Extended Stay - change travel type to allow LTTT

Tax Effective Date:* 27-Jul-2021  ←

Document Number: 70Z0TDY21000020

Figure 5: Authorization Basic Information — Tax Effective Date, Enabled

3.3 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.

3.3.1 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.

3.3.2 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.

Manage Trip Reservations

Confirmation Code: [Retrieve](#)

Select	Confirmation Number	Summary	Show	Move to Held Reservations	Cancel Reservation
<input type="checkbox"/>	EOJVZZ	05-Mar-2018 05:25pm Air travel from IAD/Dulles International (IAD) to Luxembourg Findel Airport (LUX) Govt non-contract fare limited availability, Refundable	Show		Cancel
<input type="checkbox"/>	EFZRGM	24-Jun-2018 06:20pm Air travel, Hotel, Car Rental from IAD/Dulles International (IAD) to LHR/Heathrow (LHR) Govt non-contract fare limited availability, Refundable	Show		Cancel

[Select and Close](#) [Select](#) [Exit Window](#)

Figure 6: 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.

3.3.3 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.

Manage Trip Reservations

Confirmation Code: [Retrieve](#)

[Select and Close](#) [Select](#) [Exit Window](#)

Figure 7: 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.

3.4 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.

3.4.1 Long-Term Taxable Travel

If long-term taxable travel is enabled for your office or workgroup and the trip now qualifies, based on date changes made for the amendment on the Site Details page, a warning message alerts you to the qualification when you click the **Save** or **Save and Next Step** button.

The **Tax Effective Date**, from which taxes are calculated, is also added to the Basic Information page and set with today's date. No action is required to continue with the authorization, but you may return to the Basic Information page to review and/or modify the effective date, if necessary.

3.5 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. If a method of reimbursement (i.e., Pay To) is required for authorizations, 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.
- If long-term taxable travel did not apply to a previous version of the authorization, but becomes applicable with the amendment, E2 automatically calculates the Employer FICA, Employer Medicare, and/or Withholding Tax Allowance amounts and adds them to the authorization as estimated expenses. You cannot modify these expenses, but they will be updated as the other expenses on the authorization are updated. If modifications are made to the trip that result in long-term taxable travel no longer being applicable, these expenses will be automatically removed from the authorization.

3.6 **Completing the NFS Expenses Step**

If you have NFS (i.e., non-federal sponsor) expenses, they will display on the NFS Expenses page for the amended authorization. All NFS detail information can be added, modified, or deleted. NFS expenses cannot exceed the total estimated expenses on the amended authorization.

3.7 **Completing the Accounting Step**

If your estimated expenses have changed, you should update the account codes selected to fund these expenses.

Review the **Remaining amount to be allocated** field in the Accounting section on the authorization's Summary page. If this value is not zero (0.00), you need to return to the Accounting step to review expense allocations.

- Accounting values can be added or changed, but they cannot be removed or reduced to values below the amounts already identified on paid advances or vouchers associated with the trip.
- Specification of split funding can be changed if the values associated with each account code are greater than or equal to the values identified on paid advances or vouchers associated with the trip.

NOTE: *If your agency has method of reimbursement (Pay To) enabled, the Split Funding window will show an Accounting Balances panel that recaps amount totals and "pay to" divisions.*

- Always click **Save** or **Save and Next Step** on the Accounting page to ensure accounting information is updated.

TIP: *In some instances, approvers allocate funds. If you do not normally select accounting, you will not need to make accounting changes. If you have questions about selecting funding for a trip, contact your travel policy manager for assistance.*

3.8 **Completing the Advances and Advance Accounting Steps**

Advances can be added according to the advance configuration and rules for the traveler. Advance accounting values can be added or changed, but they cannot be removed or reduced to values below any amounts already identified on paid advances associated with the trip.

3.9 **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.

3.10 **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.

3.10.1 **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.

3.10.2 **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 redisplay 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. Contact your travel policy manager for additional assistance in correcting the issue that is causing the error message.*
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.

4 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.
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.*

5 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**.

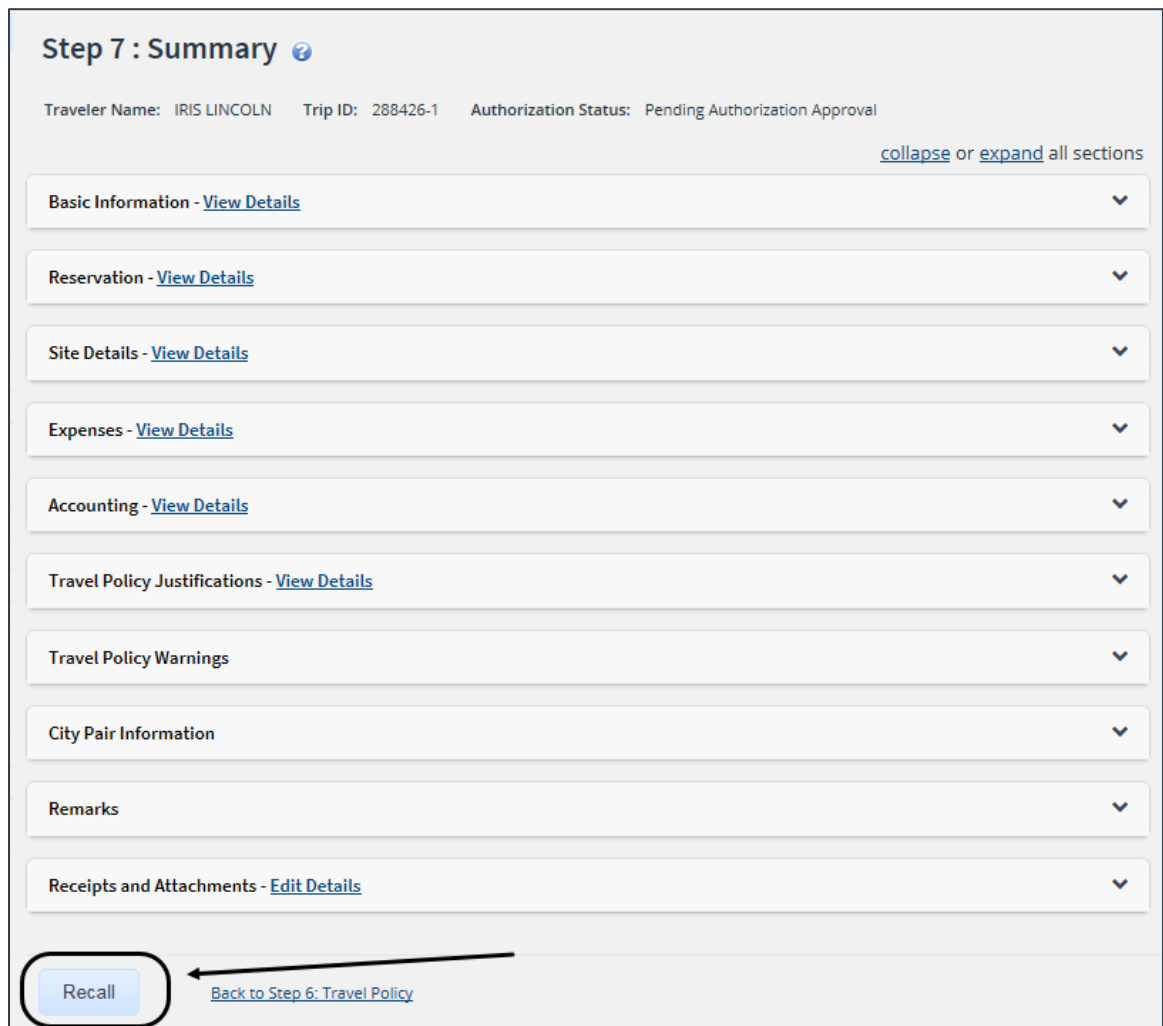


Figure 8: Authorization Summary — Recall button

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.

6 Revision History

Date	Description	Release
09/2021	<ul style="list-style-type: none"> • Added <ul style="list-style-type: none"> ○ Section 3.2.1 (Tax Effective Date) ○ Section 3.4.1 (Long-Term Taxable Travel) ○ Bullet regarding long-term taxable travel expenses to section 3.5 (Completing the Expenses Step) • Updated section 2.3 (Amending a Dependent Travel Authorization) 	21.3
04/2021	<ul style="list-style-type: none"> • Added section 1 (Introduction) • Added bullets to section 3.5 (Completing the Expenses Step) 	21.1
10/2019	Updated title page graphic and copyright information	19.3
03/2019	Copyright and logo updates	19.1
06/2018	Minor formatting changes	18.2
03/2018	Updated images throughout the document	18.1
01/2018	Document formatting and layout changes	17.4
01/2017	<ul style="list-style-type: none"> • Updated section 1.5, About the Amendment Process, for using only T&O expenses from voucher deleted by amendment process as source for new voucher T&O expenses • Updated section 2.7, Completing Accounting Information, regarding allocations by Pay To in split funding 	16.4
03/2016	<ul style="list-style-type: none"> • Updated section 1.1, Why Amend an Authorization?, for workgroups that allow itinerary changes on a final voucher • Updated section 2.3, Completing Reservations, for link name change 	16.1
09/2015	Updated images in section 2.3, Completing Reservations, for fare type information	15.4
07/2015	Updated section 2.5, Completing Expenses, for variable per diem rates for standard sites based on trip length or type of travel	15.3
11/2014	Updated section 2.9, Completing Travel Policy Information, to clarify that all listed city pair fares are one-way fares	ETS2/14.4
06/2014	Updated section 2.10, Submitting the Amended Authorization for Approval, to reflect automatic approval for amendments within travel policy tolerances	ETS2/14.2
01/2013	Copyright update	ETS2
10/2012	General availability	ETS2

7 Trademark and Copyright

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