# CONCURGOV FEDERAL TRAVELER MANUAL

Version 3.00 April, 2016







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# Section 1: Getting Started

## Log on to ConcurGov

Access ConcurGov through the internet using the following steps:

- Open a supported web browser.
- In the address bar, type <u>https://cge.concursolutions.com</u>.
- In the User Name field, type your user name, this is your short Active Directory ID@bureau.gov (i.e. jdoe@usgs.gov).
- In the Password field, type your password.
- Click the Sign in Sign in button.

Note: First time users logging into ConcurGov should read through the **Privacy Act Notice** and click the **I Agree** button.

**Note**: If this is your first time logging in, you may receive an email to establish a password and security question. As of 1/12/16, the system isn't requiring this.

The *ConcurGov Home* screen appears after logging into the system. From this central location, you can book reservations, create authorizations, create vouchers, and manage profile settings.

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**Important Note for Arrangers**: User with the Travel Arranger role, will access the **Profile** drop-down on the upper right hand of the *ConcurGov Home* screen to browse for other travelers.

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C CONCURGOV Travel	Authorizations	Vouchers	Reporting -					Profi	ile - 💄
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Shortcuts Travel New Booking   Upcoming Trips Authorizations New   View All   Search   New from Agent-booked Trip Vouchers New   View All   Search   Manage Transactions Approvals Approve Documents   Search Previous Approvals	Concur Gover of the Major A receipts to yo PLEASE ENS EXACTLY RECENT A View All Cro Name /	ent of the Interic roment Edition. irfline, Rental C ur travel vouch URE YOUR CGI UTHORIZA	ATION or is requesting This feature w ar and Hotel co ers. E PROFILE NAM	Book All us Choose	on behalf of an c travel for any sers to whom a user Cal	nother user y user (Selt I have acc	Fassign) ess	In Use	ew more Additional
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<u>Travel Policy</u>					@ Copy				2016 4:12 PM ghts Reserved

# Section 2: Updating Your Profile

A user's Travel Profile should be reviewed the first-time logging into ConcurGov. Travelers cannot begin booking a trip until the required fields in the Travel Profile are updated and saved.

• On the Menu Toolbar, click the Profile drop-down button, select the Profile Settings link.

C. CONCURGOV	Travel	Authorizations	Vouchers		Help <del>-</del> Profile - 💄	
		ALERTS		Mark B Darcy		
		1 You haven't	signed up to receive e-receipts.	Profile Settings   Sign Out		

• Click any of the links located in the navigational panel on the left or the links under the *Profile Options* section.



Click the Personal Information link:

**Personal information** section - verify that the first, middle, and last names are identical to those on the photo identification being presented at the airport.

o Enter Duty Station and Residence City, and Residence State if not populated.

Agency Information - verify that the Employee ID is populated and correct.

Duty Station Address section – verify that the Duty Station Address is accurate.

Home Address section - verify that the Home address is accurate.

**Contact Information** and **Emergency Contact** sections, verify that this information is accurate. Phone numbers and email addresses are important so that the Travel Management Center (TMC) can contact the traveler if there is an issue with a reservation, or other extenuating reasons.

Fill out the **Travel Preferences** area with Preferred Departure Airport, Special Meal needs, Hotel Preferences, Car Preferences and any Frequent Traveler Programs.

**TSA Secure Flight** required fields include with Gender and Date of Birth. In addition, update the DHS Redress Number or TSA Pre-Check Number (if applicable), to help avoid unnecessary airport delays/screenings.

Assistants and Travel Arrangers section – add the name(s) of any individuals that are authorized to book travel for the traveler.

- Verify that the charge card number is loaded in the profile with a current expiration date.
- Click the **Save** button.
- Click the Change Password link to change the current password and set up a password hint.
- Click the **Save** button to save any changes made to the profile.

Note: To save a profile, all fields marked Required must be completed.

# Section 3: Creating Travel Reservations

This section provides the procedures to complete the following tasks.

- Review the travel policy for your agency.
- Book an air, car and hotel reservation, review an itinerary.
- Review and make changes to the Authorization for a trip. After the reservation is booked, an authorization is automatically created and contains the reservation information.

The following graphic shows the flow of the travel reservation and authorization process.



**Note:** A travel authorization can be created prior to making a reservation. See *Creating an Authorization without a Reservation* in this document.

#### **Review the Travel Policy for Your Agency**

Before booking new reservations or creating an authorization, review the travel policies from GSA. Contact the travel administrator with any questions.

To review the agency's policy:

• From the ConcurGov Home screen, click the Travel Policy link located on the bottom left of the screen.



## **Book an Air Reservation**

ConcurGov provides several access points to begin booking a reservation. From the *ConcurGov Home* screen, under the **Shortcuts** section, click **New Booking**. Alternatively, click **Travel** on the *Menu Toolbar*.



## How to Book Flight or Rail Reservations

- On the *ConcurGov Home* screen, in the left navigation pane, under the **Shortcuts** section, click the **New Booking** link. Alternatively, select **Travel** on the *Menu Toolbar*.
- Click the Air/Rail 👫 button (this is the default tab) to begin entering travel reservation information.

**Note:** If airfare is not needed, select the appropriate button **car**, **hotel**, **or rail** to make another type of reservation.

• Select the applicable Air/Rail Search button: Round Trip, One Way, or Multi City.

Travel	Trip Libra	ary Tem	plates	Tools
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		Show More		

- In the **Temporary Duty Location** area, leave the default **Reference Point** radio button selected.
- Enter a landmark or preferably the city, state of the Temporary Duty Location.
- Click the **Find Location** button. A pop-up suggests locations based on the search information entered.
- Select the correct location from the **Location** drop-down and click the **Choose** button.
- In the **TDY Per Diem Location** drop-down, select the appropriate county related to the TDY Per Diem Location.
- In the From and To fields, enter the airports/airport codes related to the TDY Location.
  - **Note:** If the **Preferred Departure Airport** field is updated in the traveler's profile, the **From** field populates with that airport code.
- Select the **Outbound** and **Return** date and time for the reservation. The default number of hours to search on either side of the requested time is set to 3 hours.

**Note:** Use the drop-down to search for flight times up to +/- 9 hours from the time entered. Increasing the time window increases the number of flights.



• If a car is needed, select the Pick-up/Drop-off car at airport check box.

Other special requests related to the car are specified on the *Car Results* tab. If a car is not needed, skip this step. A car can be added later from the *Itinerary* screen. For more information on reserving a car see "Making a Car Reservation" in this document.

If a hotel is needed, select the Find a Hotel check box.
 Change the Find hotels within field to a distance large enough to return viable hotels options in the search, i.e. 20 miles.

If staying at more than one hotel during the trip or a hotel is not needed, skip this step. A hotel can be added later from the *ltinerary* screen. For more information on reserving a hotel see "Making Hotel Reservations" in this guide.

- Select the default Search flights by Price drop-down list to display flights by price.
   Optionally, select the Specify a Carrier check box to specify a specific airline for the reservation.
- Click the Search button. The airline/rail options display on a new screen.

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	Displaying: 13	2 out of 225 result	. <b>O</b>		<< Previo	ous   Page:	1 of 14	Next >>   All

The city-pair fares display with 3 stars \*\*\*\* Government Contract . The least cost fares display with a star in a square Least Cost Logical Fare icon. In this example, the first few American Airline flights are identified as

square square square and least cost fares.

If you are in a market that has multiple airports available, the matrix may show multiple options.

Optionally, use the *Shop by Schedule* tab and click the **Search** button to refresh the display. Select flights by clicking the radio button next to the Outbound flight and next to the Return flight. Click the **Price these options** button. ConcurGov shows the estimated round trip fare in the *Chosen Carriers* section.

The system always proposes the cheapest, most policy compliant flights first to keep the traveler within policy and to try and achieve cost advantageous travel.

hop by Fares Shop by S	chedule	So	rted By: Policy - Most Compliant
)isplaying: 132 out of 225 re	esults. 🚱	<< Previou	us   Page: 1 of 14   Next >>   A
American	08:35a DCA → 10:16a MSY	Nonstop	2h 41m From <b>\$306.20</b>
Airlines	05:20p MSY → 08:58p DCA	Nonstop	2h 38m View Fares
***			Flight details ∨
American	08:35a DCA → 10:16a MSY	Nonstop	2h 41m <sub>From</sub> <b>\$306.20</b>
Airlines	12:21p MSY → 03:59p DCA	Nonstop	2h 38m View Fares
***			Flight details 🗸

To reserve the selected flight, click on the View Fares button.

• The color coding of the Fares and/or Reserve buttons is as follows:

Blue **View fares**: Indicates there is more than one government contract fare to choose. Indicates the fare is within policy.

Green Select Select C: Indicates the fare is within policy.

Yellow Select Select Indicates there might be a cheaper city-pair fare at a different airport in your market. Or, there is a cheaper fare that is not a city-pair fare.

Red Select Select Indicates the fare is outside of policy. If selecting this fare, additional information must be entered on the *Travel Policy Violation* pop-up. This could be a non-refundable fare, non-Contract carrier fare, or other type of policy violation.

• Optionally, click **Show fare display legend** under the matrix to view the fare legend.



The "**R**" represents a refundable fare, "**NR**" will display non-refundable fares. You may have to click on **Shop by Fares** and/or look for **lowest published fares** in the matrix to find non-refundable options.

To view information about a specific flight, click the Flight details V link.

A 1711	08:31a DCA > 10:21a MSY 12:25p MSY > 03:57p DCA	211 30111	From <b>\$306.20</b> View fares
***			Flight details 🗸

After clicking the **View Fares** button or the **Flight details** link, the screen shows additional information about the flight.

Americ	can	8:35a DC/	A $ ightarrow$ 10:16a MSY	Nonstop	2h 41m From	\$306.20
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#J14J			uration: 2h 41m Eco GCADCA 416 lbs CC		Regional Jet 700	
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* #4646		Stops: 0 D 416 lbs CC		nomy: G Embraer	E-175 Fare basis: GC	ADCA
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- Note: Some city-pair fare flights may have discount city-pair options that are called **Govt. Contract Discounted** (**Refundable**). There are a limited number of seats on these flights that can save even more money if booked when available. Waiting to reserve the **Govt. Contract Discounted** rate may result in the rate not being available.
- Note: Use the Fare Rules link to gain an understanding of any travel restrictions, penalties, etc. that may occur if the flight needs to be changed.
  - Select the desired flight's radio button and click the **Select** button.



The Review and Reserve Flight screen displays the details related to the selected flight.

• In the Review Flights section, verify the flight detail information.

• Scroll to the *Enter Traveler Information* section to view the traveler's email and frequent flyer program information.

ENTER TRAVELER INFORMATION Ensure all traveler information below is correct.	
Primary Traveler Name: Mark B Darcy Phone: 303-202-5555 markdarcy@npw	Edit I Review all
Frequent Flyer Programs Add a Program For American Airlines American Airlines 123333	
No Program selected Alaska Airlines 883332	
Southwest 0990988 Ma United 44378999 W selecting your seats now. Otherw	ise, Concur will request them for you.

**Note:** The Frequent Flyer Program is retrieved from the traveler's profile, if entered. Optionally, users can select the **Add a Program** link to add a travel program for Air/Rail, Car Rental, and Hotels.

- Click the **Select Seats** button to view the Seat Map pop-up and choose a specific seat.
- Click any available seat and click the Select Seat button.

				Select Seat Cl	lose				
Select Seat       Close         American #4646 / Embraer E-175 / Louis Armstrong Intl Arpt (MSY) - Ronald Reagan National Arpt (DCA)         14D       Handicapped facilities									
Airlines reserve the right to re	assign handicap facility seating unless proof of disab	ility is presented.							
Seat assignment is subject to chan	Seat assignment is subject to change up until time of departure								
Available	Occupied or Unavailable	Selected		No seating @					
Preferential 🛛	Preferential								
🛨 Paid preferential 📀	★ Paid preferential								

Seat Map

- **Note:** After selecting the seat assignment for the leg being shown, the system displays a *Seat Map* popup for the remaining legs of the trip. When selecting your seat assignment, verify the flight leg. The last leg may appear before the first leg.
- **Note:** Seat maps may not be available for all flights. Some preferred seats won't be able to be booked if there is no Frequent Flyer program entered in the traveler's profile. If a seat assignment is not selected here, there are more chances to select a seat on the itinerary. It is recommended to desginate a seat preference in the traveler's profile for a better chance to avoid being assigned the middle seat when seat maps are not available.
- Verify the method of payment.

**Note:** The charge card associated with this travel activity (plane, rail, car rental, or hotel) automatically defaults. Users can add another card or select a different card if required.

• Click the Reserve Flight and Continue button to reserve the flight.

**Note:** The *Review and Reserve Car* screen displays if the **Find a Car** check box was checked. Move forward to the *Making Car Reservations* section.

#### \*\*\*\*\*

**Note:** At this point, users can add Car, Hotel, Rail, or Parking reservations to the itinerary by clicking the appropriate link.

- Click the **Next** button to:
  - Display the *Trip Booking Information* screen if no other reservations are being made
  - Display the *Review and Reserve Car* screen if reserving a car
  - Display the Review and Reserve Hotel screen if reserving a hotel but no car

**Note**: For overnight trips, if a hotel is not tied to the reservation, an *Attention* pop-up displays that must be completed in order to continue with the flight reservation.

C. CONCURGOV Travel Authorizat	ions Vouchers	Help 🕶 Profile 👻 🔔
Travel Trip Library Templates Tools		
Trip Summary         ✓         Finalize Trip         ✓         Peview Travel Details         Enter Trip Information         Submit Trip Confirmation	BookTravel Trip Booking Informat	HORIZATION       VOUCHER         O       O         CO       O         CO </th
	Ticket City Pair Program Fare Within 30 Days - Ticket Fulfillment Upon Approval	Send my email confirmation as I HTML Plain-text With my email confirmation Do not include directions to hotels with email • rip Purpose [Required] MISSION (OPERATIONAL) • muntil: 06/04/2016 06:35 am Mountain
	Please enter information about this trip then pre	ess Next to finalize your reservation. If you close at ote: Any part of the trip that is instant purchase or has
<u>Travel Policy</u>		Last logged in: 04/05/2016 8:49 AM © Copyright 2016 - Concur - All Rights Reserved

On the *Trip Booking Information* screen, enter the **Trip Description** field and click the **Next** button.

#### **Making Car Reservations**

If the **Pick Up/Drop off Car at airport** check box is selected on the *Air/Rail* tab, the *Review and Reserve Car* screen displays after the flight is reserved.

Note: Optionally, a car can be reserved directly by clicking the Car tab 🐖 on the Travel screen.

When booking a car directly after the Air search, a matrix of car rentals appears. DOI policy is to book a compact car.

#### Print / Email

## PICK UP: (MSY) ON MON, JUN 6 10:16 AM RETURN: THU, JUN 9 05:20 PM

Hide matrix

All 103 results	Conomy Car	Compact Car	Constant Car	Standard Car	Eull-size Car	Premium Car	
and the sec	8.00	9.00	12.00	17.00	17.00	49.00	
Thrifty	8.00	9.00	12.00	17.00	17.00	49.00	
enterprise	10.00	10.00	10.00	10.00	10.00	73.44	

• Scroll down the screen to book a car (underneath the matrix).

Note: Rental car search results are automatically sorted by travel policy. DOI travelers should always

choose the cars covered under the DTMO contract - notated by the 3 stars in a circle OOO and

a green Select Select Select button. Avoid reserving cars that appear with a yellow Select

Select **A** button (outside of polciy) or a red **Select D** button (exceeds approved amounts) to prevent personal liability issues when not using the Government contract rental car rates.

Displaying: 11 out of 88 results. 🚱		<< Previous 1 2 Next >>   Al	
Compact Four Door Car (Sabre)	000	more info	Extern.
Select	Unlimited miles Automatic transmission Total cost <b>\$101.76</b> *		

• Click the green **Select** button for the car being reserved.



The Review and Reserve Car screen displays details related to the selected car rental.

- In the *Review Rental Car* section, verify the car detail information.
- Scroll to the *Enter Driver Information* section to view the traveler's email and Rental Car Agency Program information.

**Note:** The Rental Car Agency Program is retrieved from the traveler's profile, if entered. Optionally, users can select the **Add a Program** link to add a rental car program.

- Verify the method of payment.
   Note: The charge card associated with this travel activity (plane, rail, car rental, or hotel) automatically defaults. Users can add another card or select a different card if required.
- Click the Reserve Car and Continue button to reserve the car.

Note: The Hotel screen displays if the Find a Hotel check box was checked. Move forward to the Making Hotel Reservations section.

#### To Reserve a Car Without Airfare

- On the *Travel Authorizations* screen, click the **Car** itab.
- In the *Temporary Duty Location* section, enter the temporary duty station in the **Reference Point** field and click the **Find Location** button.
- Select the appropriate location from the *Searching for Location* pop-up and click the **Choose** button.
- Enter the Pick-up date and Drop-off date fields.
- In the *Pick-up car at* section, select either the **Airport Terminal** or **Off-Airport** radio button, and then enter the location.

Note: Use the Search link to find locations for Off-Airport sites.

Note: Optionally, select the **Return car to another location** check box and complete the **Dropoff car at** field.

Note: Optionally, click the More Search Options link to see additional search preferences.

- Click the Search button. The car results display as discussed above.
   Note: A Warning pop-up displays reminding users to confirm the vehicle reservation is a Government rate.
- Click the green Select button next to the car being reserved.
   Note: Rental car search results are automatically sorted by travel policy. DOI travelers should always

choose the cars covered under the DTMO contract - notated by the 3 stars in a circle and a green **Select** button. Avoid reserving cars that appear with a yellow **Select** button (outside of polciy) or a red **Select** button (exceeds approved amounts) to prevent personal liability issues when not using the Government contract rental car.

- On the *Review and Reserve Car* screen, change information as desired then click the **Reserve Car and Continue** button to reserve the car.
- On the *Travel Details* screen, click the **Next** button.
- On the *Trip Booking Information* screen, complete the information and click the **Next** button.
- On the *Trip Confirmation* screen, click the **Confirm Booking** button.

#### **Making Hotel Reservations**

If the Find a Hotel check box is selected on the Air/Rail screen, the hotel results appear after the car is reserved.

Note: Optionally, a hotel can be reserved directly by clicking the Hotel tab on the Travel screen.

Hotels can be sorted by Compliance, Preference, Price, Rating, Distance and Policy.

The Lodging Per Diem allowance is displayed at the top of the listing of the hotels.

FedRooms **FedRooms Hotel** are notated with a brown star. These properties are recommended by GSA because they usually have cancellation policies up to 4 or 6 p.m. for the date of arrival and are within per diem.

The E-Receipt Enabled link appears next to some hotels. This link only displays if E-receipts is activated in the traveler's profile.

Hotel search results are automatically sorted by distance from the reference point entered in the original search.



A map displays with hotel results based on the search criteria.

Use the following tools to manage working with the map:

- Click the **Zoom** (D) (D) icons to zoom the map in or out. Optionally, use the fly wheel on your mouse or keyboard to zoom in or out.
- Click the Automatic Automatic down arrow to change how the map behaves.
- Click a star or a balloon symbol to get more information about a specific hotel. The legend under the map describes the map symbols.
- Optionally, click the Hide Map Hide Map link.



Narrow or expand the search using the following parameters located on the left side of the screen:

- Use the Find hotels within fields to expand or narrow the distance from the Reference Point.
- Use the Hide hotels over Per Diem limit check box to remove all hotels over the per diem limit.
- Select the Chain or Superchain radio button to search for a particular hotel chain.
- Use the Neighborhood and Hotel Amenities panels to further narrow the search.

\$69 - \$4,320 Hide hotels over Per Diem limit (\$122.00)		315 Julia St New Orleans, LA 70130 ♀0.52 miles   view map	*****	\$122
Hotel chain	<b>∧</b> ★		more info   compare	choose room ►
Chain Superchain	5. Hampto	n Inn & Suites Convent		
Carlson Brands (All) (1) Choice Brands (4) Illiton (All) (12)		1201 Convention Center Blvd New Orleans, LA 70130 ♀0.89 miles   view map	* * * * * * rate this hotel	\$122
Marriott (All) (19)	*		more info   compare	choose room .
Preferred Hotels (3)	••••••••••••••••••••••••••••••••••••••			
Check All I Reset	Displaying: 5 out	of 100 results. 🕐		
Hotel Amenities	<b>^</b> ]			
Breakfast (41) Broadband Internet (93)	•			
Business center (75)	-			
Convention center (0)				
Dry cleaning (77)				
Fitness center (75)	-			
Hotel amenities may change over time and without notice. Not all hotels have provided their amenities list.				
				Skip Hotel Cancel
<u>Travel Policy</u>				ogged in: 04/05/2016 8:49 AM - Concur - All Rights Reserved

To reserve a room:

- Scroll down the screen to see available rooms.
- Click the **more info** link to view more detailed information for a specific hotel, e.g., Amenities, WiFi access, and restaurants.
- Click the **choose room** link below the hotel name to view the room selection for the specific hotel.

3. Homewood	901 Poydras St New Orleans, LA 70112 0.11 miles   view map	★★★★★ ○○○○ rate this hotel	\$122
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• \$122	★ FedRooms - 2queen Hearing A sofabd (Rate Code: A0GA1F) (Sab	-	irealrm/door/phn Alrt-ktchn-
Rate details / C	ancellation policy		
			Select 📎

The Select buttons are color coded as follows:

- Green Select . Indicates the hotel is within policy.
- Yellow Select **A**: Indicates the hotel is outside of policy and, if selected, additional information must be entered. These hotels may still be within per diem but not participating in the FedRooms program.
- Red Select **(**): Indicates the hotel is outside of policy and, if selected, additional information must be entered.

• Click the radio button next to the desired room and click the green **Select** button to reserve the room. The *Review and Reserve Hotel* screen displays details related to the selected hotel.

- In the Review Hotel Room section, verify the room detail information.
- Scroll to the *Enter Hotel Guest Information* section to view the traveler's email and Hotel Program information.

**Note:** The Hotel Program is retrieved from the Traveler's profile, if entered. Optionally, users can select the **Add a Program** link to add a hotel program.

- Verify the method of payment.
  - **Note:** The charge card associated with this travel activity (plane, rail, car rental, or hotel) automatically defaults. Users can add another card or select a different card if required.
- Review the Accept Rate Details and Cancellation Policy information and click the "I agree" check box.

• Click the **Reserve Hotel and Continue** button to reserve the room. **Note:** This displays the *Travel Details* screen.

Continue to the **Completing the Reservation** section below.



#### To Reserve a Hotel Without Airfare

- On the Travel Authorizations screen, click the Hotel <sup>i</sup> tab.
- In the **Temporary Duty Location** section, enter the temporary duty station in the **Reference Point** field and click the **Find Location** button.
- Select the appropriate location from the *Searching for Location* pop-up and click the **Choose** button.
- Enter the Check-in Date and Check-out Date fields.

Note: Use the Find hotels within fields to expand or narrow the distance from the Reference Point.Note: Optionally, select the Airport, Agency Location, Address, or Reference Point/Zip Code radio button as a location around which to search for a hotel.

- **Note:** Optionally, select the **With names containing** check box and enter the key word characters to search for a specific hotel.
- Click the **Search** button. A map displays with hotel results based on the search criteria.
- Continue booking a hotel using the steps in the **Making Hotel Reservations** section.

#### **Completing the Reservation**

On the *Travel Details* screen, users can print or email the itinerary. In addition, users can change or cancel any reservations, select a seat, change the Frequent Flyer Program, add a car, hotel, or rail reservation, view fare rules, and complete the reservation. Click the appropriate links on this screen to make changes or view these items.

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• On the Travel Details screen, click the Next button to display the Trip Booking Information screen.

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Travel Trip Library Templates Tools			
		AUTHORIZATION VOUCHER	
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		press Next to finalize your reservation. If you close at 1. Note: Any part of the trip that is instant purchase or has y Trip Hold Trip << Previous Next >> Cancel	
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- On the *Trip Booking Information* screen, enter the **Trip Description** field to identify the trip and provide useful information about the trip.
- Select the **Trip Purpose** using the drop-down menu.
- Optionally, select whether to email directions and/or maps to the hotel in the email confirmation.
- Click the **Next** button.
- On the *Trip Confirmation* screen, click the **Confirm Bookings** button.
  - **Note:** The Travel Authorization for the reservation is automatically created. The *View Associated Authorizations* screen displays.
    - If a hotel is not on an overnight reservation, a pop-up displays prompting the user to indicate the reason for not booking a hotel from the drop-down list.
    - Note: Travelers can search as many times as they want to for various fares, but make sure not to click Confirm Bookings button until pretty firm about the reservations. ConcurGov uses live inventory and airlines can charge a fee if they notice Churning (travelers booking inventory and then making multiple changes to that booked trip). The system may also generate a Churning

error and prevent the traveler/arranger from making the change. The ConcurGov system will also email users who have not clicked **Confirm Booking** that their trip will be canceled unless they finish the reservation that same day.

The screen defaults to the *Summary* tab to view the document summary, and users should make any appropriate changes to the document such as adding expenses in the *Expenses & Receipts* tab, assigning accounting codes in the **Accounting** tab, performing a pre-audit on the **Perform Pre-Audits** tab, etc. To make changes to the reservation, click the **Document Actions** button and select the **View/Change Reservations** button. After changes are made, review the pre-audits, stamp and submit the authorization for approval. More details on these tabs to follow.

View Associated Authorizations	BOOKING Create	AUTHORIZATION	VOUCHER
		Close Document	Document Actions -
Traveler: Mark Darcy Authorization: TANUM000003OS (TANUM000003OS)			
Summary Profile Group General Expenses & Receipts Exceptions Account	ting Totals Perform Pre-Audits	Confirmation	
← Previous	Save Changes		Next →
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For specific information, click on a Details link. You can sign and stamp your docum Page Help	nent from the Document Status section	on.	

# Section 4: Creating, Reviewing, and Submitting an Authorization

This section describes how Authorizations are created after a booking is confirmed. This section explains how to review the authorization and submit an authorization for approval.

## **Creating an Authorization**

ConcurGov automatically creates an authorization after a booking is confirmed. The authorization provides the aggregated costs of the reservations and calculates per diem allowance estimates based on the TDY location selected for the trip.

An authorization can be created without making a reservation. For more information, see *Creating an Authorization without a Reservation* below.

## **View Associated Authorizations**

After a booking is confirmed, the *View Associated Authorization*s screen displays the document toolbar. Use this toolbar to view the document summary and make changes or add information to the document as appropriate.



#### **Document Summary**

The *Summary* tab, (aka Document Summary) is the primary review tool for travelers to view document details, including per diem location, reservation information, expenses, accounting, and calculated per diem allowances for a trip.

The *Summary* tab sections correspond to the tabs on the document toolbar. Scroll through the *Summary* screen to view these sections and click the **Details** link to the right of the section heading to make changes. Clicking a **Details** link changes the focus to the appropriate *Document Toolbar* tab.

- **Summary**: Provides summary for all sections of an authorization. Users can make all changes to the Authorization by clicking the appropriate **Details** links on this screen.
- **Profile**: Add or make changes to the traveler's profile information. This section can also be used by Federal Traveler Arrangers who make travel arrangements for others.

- Group: Add and view group authorizations (not really used by DOI).
- General: View and add document and trip information.
- Expenses & Receipts: Add or delete expenses and attach, view or delete receipts.
- Exceptions: Displays Other Authorizations i.e. Excess Baggage, Rental Car Authorized.
- Accounting: Enter accounting codes.
- **Totals**: Display expenses by summary or category details, accounting details, and advance details.
- **Perform Pre-Audits**: Displays the pass/fail status each item required in the Audit Process. A reason is required for each audit item that displays Fail.
- **Confirmation**: Apply a status i.e. "Authorization Signed" and then stamp and submit the document for approval. Provides Document Routing information and Document History.

#### **Using Document Summary to Review Documents**

The *Summary* tab is the primary review tool for approvers and the only place where a traveler, document preparer, or approver can view calculated per diem allowances for a trip. With the *Summary* tab, users can:

- Navigate to any part of the document to view or make changes.
- Review, update, and delete expenses already entered on the document.
- Attach or delete receipts/documentation.
- Enter comments pertinent to the document.
- Stamp and route the document.

#### Creating an Authorization without a Reservation

This section details how to create an authorization when starting with a reservation. Examples of when online reservations may not be needed include field work, pre-arranged accommodations, etc.

#### To create an authorization without a reservation

• From the ConcurGov Home screen, under the Shortcuts → Authorizations section, click the New link. Alternatively, click Authorizations → New Authorization on the Menu Toolbar.

**Note**: If the TMC was called to make a reservation, click the **New from Agent-booked Trip** link. Choosing this option, requires the Record Locator number to be entered. This code should be on the emailed itinerary that is sent to the traveler from the Agent.

- Select a **Document Type** Authorization from the **Document Type** drop-down.
- Click the **Create Document** button.
- On the *Document Information* tab, enter the required document information below. The **Document Type**, **Document Name**, **Document Date**, and **TA Num** fields pre-populate.
  - **Type Code:** Use the drop-down to select a type code. Most travelers choose Trip by Trip, but there are other options to indicate: Invitational Travel (non-DOI employees), Tour Renewal Travel, Limited Open and Taxable TDY. Check with your bureau on policies related to allowable Open authorizations.

Purpose Code: Use the drop-down to select the appropriate purpose code.

**Document Detail:** Type a detailed description of the details/reason for travel.

- Click the *Trip Information* tab, enter the information below.
  - **Depart Selection:** Use the drop-down to select a departure location. This notates whether the traveler is departing from Residence, Duty Station, or another location. Users on details should choose the **In Travel Status** selection when filing multiple vouchers on every voucher except the first voucher.
  - Return Selection: Use the drop-down to select a return location. This notates whether the traveler is returning to Residence, Duty Station or another location. Users on details should choose In **Travel Status** selection when filing multiple vouchers until they are ready to submit their final voucher and return to Residence or Duty Station.

**Trip Duration:** This field defaults to Multiple days. Use the drop-down if the trip is 12 hours or less, or 12-24 hours with or without lodging.

Comments: Type any comments for the document, or click Preset to add preset comments.

Arrival Date: Type or select the first day of the trip.

Departure Date: Type or select the last day of the trip (or the last day for that TDY location).

Itinerary Location: Enter the TDY location, or use the Itinerary Location Lookup icon Q to search for the TDY location.

Enter additional dates and locations if necessary.

The individual Purpose codes are optional.

Use the **Unlisted** check box if going to a remote unlisted location.

• Click the Create Document button.

The next screen defaults to the *General* tab and users should make any appropriate changes to the document such as adding expenses in the *Expenses and Receipts* tab, assigning accounting codes in the *Accounting* tab, performing a pre-audit on the *Perform Pre-Audits* tab, etc. When all changes are made, review the *Perform Pre-Audits* tab, then stamp and submit the authorization for approval. These tabs are detailed next.

# Section 5: Working with Expenses & Receipts

The expense information in this guide applies to actions taken on authorizations and/or vouchers.

DOI receives an interface file from JP Morgan Chase (this functionality is expected later in our deployment), almost all charge card expenses are automatically added to the traveler's voucher when posted to a charge card. However, there may be times when an expense, such as mileage, shuttles, etc. need to be added to the document.

Caution: Do not to leave duplicate expenses from the authorization and Itemized expenses pulled from the Charge Card tab on the voucher.

Entering expenses can be accessed by clicking the **Details** link in the *Expense* section on the *Summary* screen or clicking the *Expenses & Receipts* tab on the **Document Toolbar**. All expenses can be managed from this area, including itemizing and deleting expenses.

The following table describes the options on the Expense List area:

Expense List Options	Description
Select All	Click the Select All Select All expenses link to delete all expenses. Deselect a check box to prevent that expense line from being deleted.
Deselect All	Click the Deselect All Deselect All expenses link to remove the selected check boxes marked for deletion.
Action column	Click the <b>Edit Expense</b> icon on an expense line to edit the expense in the <b>Add Expense Details</b> section.
	Click the <b>Itemize Expense</b> icon on an expense line to itemize the expense (related to Charge Card items). This opens the <i>Add Child Expense Details</i> screen.
Delete	Select the check box to identify an expense to be deleted.
Expense Date	The date the expense was incurred.
Expense Description	The description of the expense.
Amount	The amount of the expense. For reconciliation expenses, the Amount can be negative.
Туре	The type of expense. Valid values include <b>CC</b> (applied charge card expenses) and <b>RO</b> (read-only expenses).

#### Adding an Expense

• On the Authorizations Summary screen, click the **Details** link to the right of the Expenses section or click the Expenses & Receipts tab at the top of the screen.

The Add Expense Details pane displays to the right of the Expenses List.

On the **Add Expense Details** pane, there is an optional field called **Create Expenses Through** field, where a user can type the date through which the expense should be replicated if needed.

- In the **Expense Date** field, update the date if required.
- From the Expense Description drop-down, select an expense description.
  - After selecting an expense description, the following fields are available: **Cost**, **Payment Method**, **Show Other Details** link, **Show Per Diem Conditions** link (for per diem expenses).
- In the **Cost** field, enter the dollar amount of the expense. Use the **Foreign Calculator** icon to convert the cost to another currency.
- From the **Payment Method** drop-down, select a payment method if necessary. The payment method defaults based on policy and common practice.
- Click Save button after adding each expense.
   Important Note: To add any additional expenses, click the Add Expenses button on the left side of the screen or the new expense will overwrite the previously entered expense.
- In general, any expense marked with **RO** (read only) will not be able to be edited.

## Working with Per Diem Expenses

Per Diem Expenses (Lodging and M&IE) display under *the Expenses & Receipts* tab with a few additional options to allow travelers to claim Actuals, Deduct Meals Provided, Deduct for days of Annual Leave and alter M&IE amounts i.e. reduce to 55% for extended details or adjust camp rates.

• Lodging Fields:

- **Copy Per Diem Expense Values and Conditions** link: use these fields to change the Lodging per diem expense for multiple days.
- **Expense Description:** shows as Lodging.
- Cost: defaults with the lodging reservation cost if booked through ConcurGov or can be manually entered if booked outside the system.

Note: If the hotel reservation is booked through ConcurGov, you will not be able to delete that lodging expense or alter the dollar amount until the voucher is created or alternatively changing the reservation in ConcurGov. In the voucher, you will be able to alter the lodging dollar amount and delete any inaccurate lodging expense.

- **Payment Method:** defaults to GOVCC-C but can be changed if for some reason the traveler could not use the Government card to pay for lodging.
- **Show Other Details** link: this field isn't really relevant to the traveler and just has informational items.
- Show Per Diem Conditions link: radio button defaults to Regular Lodging. Travelers who have justified and been approved to exceed the per diem allowance under rare circumstances, need to change the radio button to Actual Lodging or the difference between actuals and allowed will be reflected on the authorization and deducted on the voucher.
- Click **Save** if any changes are made in this section.

## Edit Expense Details

Create Expenses Through Expense Date* 06/06/2016 Expense Description* Lodging Cost* 115.00 II USD Payment Method* GOVCC-C V
Expense Description* Lodging Cost* 115.00 E USD Payment Method* GOVCC-C •
Cost* 115.00 E USD Payment Method* GOVCC-C   Show Other Details
Payment Method* GOVCC-C    Show Other Details
✓ <u>Show Other Details</u>
<ul> <li>Hide Per Diem Conditions Per Diem Rates: 122.00 / 64</li> <li>Regular Lodging</li> <li>Actual Lodging</li> <li>Conference Allowance</li> </ul>

- M&IE Fields:
  - Copy Per Diem Expense Values and Conditions link: use these fields to change the M&IE per diem expense for multiple days.
  - Expense Description: shows as M&IE.
  - Cost: defaults with the allowable M&IE rate for the TDY location.
  - **Payment Method:** defaults to Reimbursable.
  - Show Other Details link: isn't really relevant to the traveler and just has informational items.
  - **Show Per Diem Conditions** link: radio button defaults to Regular Lodging but has other helpful options:

 Meals Provided radio button: check the appropriate boxes if Breakfast, Lunch, and/or Dinner are provided and click the Save button.

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Create Expenses Through	
Expense Date*	06/06/2016
Expense Description*	M&IE
Cost*	33.00
Payment Method*	REIMBURSABLE V
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These conditions apply 06/06/2016	to all per diem expenses on
Regular M&IE	
Meals Provided	
🕑 Breakfast	
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Actual Meals	
MRIE Override	

Actual Meals radio button: use to alter the M&IE Amount for the entire trip i.e. reduce to 55% or reflect a reduced camp rate without a ¾ deduction on first and last day, go back to the top and use Copy Per Diem Expense Values and Conditions link through the ending date of the trip and change the Cost to the lower M&IE Amount, and click the Save button.

		Help 🗸
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View Authorizations New A	Copy Per Diem Expense Values and Conditions	x
View Associate	Expense Description M&IE Expense Category M&IE-PerDiem	Approval
Traveler: Mark Darcy Authorization:	Copy From 06/06/2016 Copy Through <sup>*</sup> 06/09/16 •	ment Document Actions -
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← Previous	The values specified below will be copied to all expenses of the same Per Diem type for the duration specified.	Next →
Page Help	Cost* 20.00	lues and Conditions
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Expense List	Per Diem Conditions	
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2 🖋 🗋 🗐 04	Meals Provided     Actual Meals	3 Per Diem Rates: 122.00 / 64.(
3 🖌 🕅 🗐 🛛 06	M&JE Override	per diem expenses on
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5 / 🕅 🗐 🛛 06		•
	06/2016 🚖 Rental Car 179.96 🗌 Lunch	
	Dinner	
	Actual Meals     Actual Meals	<b>•</b>
6 Previous	Clear Save	Next a
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• To notate annual leave while in travel status, check the **On Leave** check box, the radio button defaults to Annual, enter the number of hours in the Hours field.

Alide Per Diem Conditions Per Diem Rates: 122.00 / 64.€
These conditions apply to all per diem expenses on 06/06/2016
Regular M&IE
Meals Provided
O Actual Meals
M&IE Override
<ul> <li>On Leave</li> </ul>
Annual Other Hours <sup>*</sup> 8.00

# Section 6: Accounting

Most FBMS Bureaus and Departmental Offices use many different combinations of accounting elements such as Cost Center, WBS, Fund, and/or Functional Area. There may be times when an office feels it is appropriate to charge a Work Order or Real Estate Object and those options are available in ConcurGov. All Bureaus/Offices except for USGS enter the appropriate accounting elements as a new label and then save those labels as favorites. USGS will be able to Search for their accounting labels/WBS using the Search field.

• Select on the Accounting tab.

- Click the Add New Accounting link.
- Enter a Label for this account code. This can be any name that makes sense to the user.
- Enter the current Fiscal Year for this account code.
- Enter a combination of:
  - Cost Center (mandatory)
  - WBS (optional except for USGS)
  - Fund (optional may be derived or derived from a partial fund)
  - Functional Area (optional may be derived)
  - Note: Use the Order field if charging a work order for this travel expense. Use the Business Entity, Building No., Land Number, and/or Rental Unit fields if charging this travel to a Real Estate Object.
- Click the Save Accounting Updates button.
  - **Note:** To charge this travel to more than one line of accounting, click the **Add New Accounting** link, enter a new **Label**, enter the **Fiscal Year** and repeat the steps above to add the new accounting elements (Cost Center, WBS, Fund, Functional Area etc). Then follow the Allocating Expenses instructions below to split charges to multiple accounts.

Summary         Profile         Group         General         Expenses & Receipts         Exceptions         Accounting         Totals         Perform Pre-Audits         Confirmation
Cancel Accounting Updates Save Accounting Updates Update Extended Accounting
Add Accounting for TANUM000003OS
Add new or edit existing account code. You must enter an account label before updating the extended account codes. Page Help
Organization: DOIP Account Org - Structure DOI - Static LOA
Label Mission Support Fiscal Year 2016 Sponsored Long Term Taxable Save to master list
Accounting
Cost Center
WBS
Order
Fund
Functional Area
Business Entity
Building No
Cancel Accounting Updates Save Accounting Updates Update Extended Accounting

USGS only: Use the Enter Search Criteria section and enter the label with the two digit FY, space, WBS
e.g. 15 GX15AE00COM0000, to be charged in the Accounting field, then click on the appropriate label
to add it to your document.

## Allocating Expenses to One or More Accounting Codes

If a document has more than one accounting code, use the allocate cost icon to allocate the expenses across the accounting codes. The following allocation methods are available:

• Date
- Expense category/payment method
- Expense
- Location
- Percent
- Amount

Acco	Accounting Applied to TANUM000003OS								
Alert	Actions	Organization	Label	Sponsored	LT Taxable	Default	Classification Code	Amount	
	▰ゐ♤ݨ	DOIP	Mission Support			۲	PPWOCRGRME/PX.GCRGR1554.00.1//156P5140NA////	1,078.17	
	◢ ๎ 🎝 🖒 🗖	DOIP	NPS Valid 2015			0	ppwowmadl1/px.xwmad13ad.00.1//133/////	0.00	

To allocate by Date, Expense Category, Expense or Location:

• Click the Expense Level Allocation tab.

Accounting Allocation Summary

Breakdown By Expense Category	Expense Level Allocation	Document Level Allocation
-------------------------------	--------------------------	---------------------------

- To allocate by Date: click on the asterisk (\*) under the Date column, enter the **Begin Date** field for charges for each accounting label and then click the **Save Allocation Changes** button.
- To allocate by Expense Category/Payment Method: click the Expense Category / Payment Method link, and use the Organization/Label drop-down boxes to pick the line of accounting for each Expense Category or Payment Method. Then click the Save Allocation Changes button.
- To allocate by Expense: click the Allocated By **Expense** link, and use the drop-down boxes to pick the line of accounting for each Expense. Then click the **Save Allocation Changes** button.
- To allocate by Locations (requires multiple TDY Locations on the document): click the Allocated By Location link and use the drop-down boxes to pick the line of accounting for each location. Then click the Save Allocation Changes button.

Breakdown By Expense Category Expense Level Allocation			Document	Level Allocation			
Expense Lev	el Allocation						_
Organization	Label	Sponsored	Date	Allocate By	Allocate By	Allocate By	Allocate By
DOIP	Mission Support	No	×	Fiscal Year	Expense Category / Payment Method	Expense	Location
DOIP	NPS Valid 2015	No	×	Fiscal Year	Expense Category / Payment Method	Expense	Location

To allocate by Percent or Amount:

• Click the Document Level Allocation tab.

Accounting Allocation Summary						
	Breakdown By Expense Category	Expense Level Allocation	Document Level Allocation			

• To allocate by Amount: click the dollar **Amount** link under the Amount column, then enter the appropriate dollar amounts to be allocated to each line of accounting. Then click the **Save Allocation Changes** button.

• To allocate by Percent: click the **0** link under the Percent column, then enter the appropriate percentages to be allocated to each line of accounting. Then click the **Save Allocation Changes** button.

reakdown By Expense Cat	egory Expense Level Allocation Documen	t Level Allocation			
Document Level A	Allocation				
Organization	Label	Sponsored	Amount	Retained	Percen
DOIP	Mission Support	No	1,078.17		(
DOIP	NPS Valid 2015	No	0.00		(

Note: Use the **Allow Exceptions** check box (in the various allocation screens) to provide the ability to add expenses on the *Expenses & Receipts* tab and send individual expenses to either account even if the rest of the document is split 50-50, by date, etc. Allow exceptions is not available when allocating by amount or expense.

Remember that all Charge Card items still need to be reallocated in FBMS to actually move centrally-billed charges from default accounts to other accounts when applicable.

## Section 7: Perform Pre-Audits and Confirmation Tabs

When the travel/arranger has finished entering the expenses and the accounting on the authorization or voucher, the traveler needs to sign the document to initiate the routing to the next person or persons in the routing list for approval. Routing lists may have conditional routing that sends a document through different approvals depending on whether the conditions were met. This is called *conditional routing*. An example of conditional routing is an authorization that includes foreign travel that requires additional approval at a higher level. Some offices may have multiple reviewers and approvers in the routing list.

Important note: Tickets will not be issued until the final approving official in the routing list approves the authorization, so it is important that non-refundable reservations are approved within the same 24 hour period or the reservation will be lost and the traveler will need to re-book.

To stamp a document, follow these steps:

- Select the *Confirmation* tab (or scroll down to the *Document Summary* section at the bottom of the *Summary* tab.)
- Status to Apply: Select a status code from the Status to Apply drop-down. Use Authorization Signed to sign an authorization, use Voucher Signed to sign a Voucher.
- **Remarks:** This field is optional. Enter any explanation/comments about the document that the approving official(s) needs to see. The remarks are saved with the history of the document and can be viewed in the Document History area.
- Click the Stamp and Submit Document button.
- This action shows the items on the Perform Pre-audits tab.
- Review the Pre-Audit list:
  - If any of the Audit Process status show as FAIL, click on the **Justify Pre-Audit Results** button. Enter the justification(s) in the Comments box and click the **Save Justification** button.
  - If they all show with a status of PASS or after you save comments, click the Continue Stamping the Document button.
- Read the important text describing the impacts of legally signing this document and click the **Accept Signature Text** button.
- This completes signing/stamping the document and shows the next users in the routing list. Click the **Close Post Stamping Document Closure Screen** button.
- Always use the **Log Out** words to close ConcurGov and **not** the normal red x (internet close button) or else you can lock your document and may need a FATA to unlock it.

## **Section 8:** Creating a Voucher from an Authorization

When travel is completed, the traveler should complete a voucher within 5 business days. Sections 6-8 of this guide covering Expenses, Accounting, and Stamping the Document work the same in ConcurGov whether the user is creating an authorization or a voucher. This section recaps the steps to file the voucher for reimbursement.

## **Creating a Voucher**

- On the *ConcurGov Home* screen, in the left navigation pane, under the **Shortcuts/Vouchers** section, click the **New** link. Alternatively, select **Vouchers** → **New Vouchers** on the *Menu Toolbar*.
- On the *New Voucher* screen, next to **Document Type** select **Voucher From Authorization** from the Document Type drop-down.
- Click the Create Document button.
- Scroll down to the document list and click the pencil/paper icon 
  next to the authorization being used to create the voucher. The authorization must have an approved status to be able to create the voucher.
- Review the fields on the *Document Information* tab. The **Document Type**, **Document Name**, **Document Date**, and **TA Num** fields pre-populate.
  - **Type Code**: should populate with trip type from the Authorization, otherwise use the drop-down list to select a type code.
  - **Purpose:** should populate with trip purpose from the Authorization, otherwise use the drop-down list to select a type code.
  - **Document Detail**: should populate with trip description from the Authorization, otherwise type a detailed description documenting the reason for travel.
- Review the fields on the *Trip Information* tab. Note: If revisions to the trip dates or TDY locations(s) associated with the travel are needed, make those changes from the *General* tab, after the document is created.
  - In the Depart Selection drop-down list, verify if traveler left from the duty station, residence, or in cases of extended details choose "IN TRAVEL STATUS" when appropriate.
  - In the Return Selection drop-down list, verify if traveler returned to the duty station, residence, or in cases of extended details, choose "IN TRAVEL STATUS" when appropriate.
  - Verify the **Trip Duration**.
  - In the Comments field, type any comments for the document, or click the Preset button to add preset comments.
  - In the Itinerary Location section, review that the Arrival Date reflects the first date of the trip, that the Departure Date reflects the last date of the trip (or dates for each individual TDY location) and that the Itinerary location(s) are correct. If needed, use the binoculars to search for various TDY locations.
  - o Click the Create Document button. The document is saved on creation.
- Select either the *Summary* or *Expenses & Receipts* tab, scroll down to the **Receipts** section. Use the **Attach Receipt Images** link to attach scanned receipts or use the **Print Fax Cover Page** link to fax in receipts. The bar code on the fax cover page is document and traveler specific.
- Select the *Expenses & Receipts* tab and review the expense details.
  - Lodging and Per Diem expenses automatically populate. Use the Edit (paper/pencil) icon I to edit if necessary.
  - Review all expenses in the Expense List, use the Edit (paper/pencil) icon for edit dates, costs, and if applicable payment method for any expenses that differ from amounts listed on the authorization. Click the Save button after any edits.
  - Use the Delete check box next to any expense being deleted from the voucher and then click the **Delete Selected Expenses** button.

- Use the Add Expense button to add any new expenses on the voucher. Click the Save button after any additions and then click the Add Expense button to add another expense if needed. Repeat until all expenses are added.
- If the expense applies to multiple days, type or select a date in the **Copy Through** field to replicate the expense.
- For more detailed information on expenses see Section 5 Working with Expenses of this guide.
- Select the Accounting tab; review any accounting codes already selected for the document which are

displayed in the **Accounting Applied to TANUM** section. Use the edit (paper/pencil) icon </ to edit if necessary.

• For more details on using accounting codes, see Section 6 Accounting of this guide.

- Select the *Totals* tab, review the **Expense Summary** section.
- Select the Confirmation tab, in the Status to Apply field, verify that VOUCHER SIGNED is selected.
- Click the Stamp and Submit button.
- This action shows the items on the Pre-Audit Results for TANUM screen.
- Review the Pre-Audit list:
  - If any of the Audit Process status show as FAIL, click on the Justify Pre-Audit Results button.
     Correct the item(s) or enter the justification(s) in the Comments field for failed items and click the Save Justification button.
  - If all audit items show with a status of PASS or after you hit **Save Justifications**, click the **Continue Stamping the Document** button.
- Read the important text describing the impacts of legally signing this document and click the **Accept Signature Text** button.
- This completes signing/stamping the document and shows the users in the routing list. Click the **Close Post Stamping Document Closure Screen** button.
- Once approved, the voucher interfaces through FBMS for payment.
- To close ConcurGov, on the Menu Toolbar, click the Profile drop down, select the Sign Out link.
   Note: Always use the Sign Out words to close and <u>not</u> the normal red x (internet close button) or else the document may be locked and may need a FATA to unlock it.

## **Creating Interim Vouchers for Long Term TDY**

GSA policy requires travelers to submit a voucher at least every 30 days for extended trips such as details. Travelers on a trip that is longer than 30 days can create and submit Interim Vouchers. You can create multiple Interim Vouchers from the same authorization until the Final voucher of the detail. You should not attempt to remove or alter any expenses from vouchers that have been previously paid.

**Note:** DOI policy requires travelers to reduce the allowable lodging and M&IE amounts to 55% of the extended TDY per diem location from Day 1 of the assignment when detailed to the same extended TDY location for more than 30 days.

How To Create a an Interim Voucher:

- On the *ConcurGov Home* screen, in the left navigation pane, under the **Shortcuts/Vouchers** section, click the **New** link. Alternatively, select **Vouchers** → **New Vouchers** on the *Menu Toolbar*.
- On the *New Voucher* screen, next to **Document Type** select **Voucher From Authorization** from the Document Type drop-down.
- Click the **Create Document** button.
- Scroll down to the document list and click the pencil/paper icon 
  next to the authorization being used to create the voucher. The authorization must have an approved status to be able to create the voucher.
- Review the fields on the *Document Information* tab. The **Document Type**, **Document Name**, **Document Date**, and **TA Num** fields pre-populate.

- **Type Code**: should populate with trip type from the Authorization, otherwise use the drop-down list to select a type code.
- Purpose: should populate with trip purpose from the Authorization, otherwise use the drop-down list to select a type code.
- **Document Detail**: should populate with trip description from the Authorization, otherwise type a detailed description documenting the reason for travel.
- Review the fields on the *Trip Information* tab. Note: If revisions to the trip dates or TDY locations(s) associated with the travel are needed, make those changes from the *General* tab, after the document is created.
  - In the **Depart Selection** drop-down list, verify if traveler left from the duty station, residence, or in cases of extended details choose "IN TRAVEL STATUS" when appropriate.
  - In the Return Selection drop-down list, verify if traveler returned to the duty station, residence, or in cases of extended details, choose "IN TRAVEL STATUS" when appropriate.
  - Verify the **Trip Duration**.
  - In the **Comments** field, type any comments for the document, or click the **Preset** button to add preset comments.
  - In the Itinerary Location section, alter the Arrival Date and Departure Date fields to reflect just the period covered by this voucher.
  - o Click the Create Document button. The document is saved on creation.

Document Information Tr	rip Information							
*Required Field								
Trip Number 🛛 🔻 Ď	Add Trip 🖉 Allow d	hanges to reservations to shorten this	trip					
Depart From RES: Golde	en, Col Depart	Selection RES: Golden, Col 🔹						
Return To IN TRAVEL	STATUS Return	Selection IN TRAVEL STATUS V						
Trip Duration Multiple day	ys 🔻 Trip B	egin Date 06/06/2016	Trip End Date	7/31/2016				
Comments								
- Hoster								
Itinerary Locations Add more rows								
Row Alerts Delete A	Arrival Date <sup>*</sup> Departure	Date* Itinerary Location*		Purpose Unlisted				
1 💼	III 06/06/20 III 06/	18/2016 NEW ORLEANS, LA	Search Q	MISSION (OPERATIONAL)				

• Select the Summary tab.

Note: If this is the final voucher for the extended detail, the **Final Voucher** check box Final Voucher is checked as long as the Return Selection shows Residence/Duty Station.

- Select either the Summary or Expenses & Receipts tab, scroll down to the Receipts section. Use the Attach Receipt Images link to attach scanned receipts or use the Print Fax Cover Page link to fax in receipts. The bar code on the fax cover page is document and traveler specific.
- Select the *Expense* tab, enter/edit any expenses to be vouchered for, do not edit previously paid expenses. If the M&IE was not reduced on the authorization, make sure to:
  - Click on Edit (Pencil/Paper) next to the first day of Lodging
  - Use **Copy Per Diem Conditions through** to change the dates to reflect the voucher dates
  - Use the **Cost** field to enter the reduced 55% rate (an example is shown below)
  - Click the **Save** button
  - Click on Edit (Pencil/Paper) next to the first day of M&IE
  - Use Copy Per Diem Conditions through to change the dates to reflect the voucher dates

- Use the **Cost** field to enter the reduced 55% rate
- Click the Show Per Diem Conditions Link and choose the Actual Meals radio button
- Click the **Save** button

<ul> <li>Previous</li> </ul>					Clear Save				Next →			
Add Exper	nse Dele	te Selecte	ed Expenses					*		*Required Field		
Expense	e List								Edit Expense D	otails		
For Delete: Select All Deselect All					Currency: U.S. Dollar Copy F				Copy Per Diem Expens	py Per Diem Expense Values and Conditions		
# Alert	Actions	Delete	Date	Source	Expense Description	Amount	Туре		Create Expenses Through			
1	🖋 🖞 🖹		04/05/2016		Estimated TDY Voucher Fee	14.75	RO		Expense Date*	06/06/2016		
2	🖌 🖒 🗐		04/05/2016		Estimated Travel Fee	8.26	RO		Expense Description*	Lodging		
3	🖊 🖒 🗐		06/06/2016		Airline Flight	306.20			Cost*	115.00		
4	<b>/</b> ) 🖹		06/06/2016		Lodging	115.00			Payment Method*	GOVCC-C V		
5	/ 🕯 🖹		06/06/2016		M&IE	48.00			✓ Show Other Details			
6	🖊 🗋 🗐		06/06/2016	8	Rental Car	179.96			✓Show Per Diem Con	ditions Per Diem Rates: 122.00 / 64.0		
7	🖊 🖒 🖹		06/07/2016		Lodging	115.00						
8	🖊 🖒 🖹		06/07/2016		M&IE	64.00						
9	/ 向自		06/08/2016		Lodging	115.00		Ŧ				
- Previous						Clear	Save			Next →		

#### Copy Per Diem Expense Values and Conditions

Selected Per *Required Field	Diem Expense Save							
Expense Date	06/06/2016							
Expense Description	Lodging							
Expense Category	Lodging-PerDiem							
Copy From	06/06/2016							
Copy Through*	06/08/16 🔻							
Values to Cop	ру							
The values specifie for the duration spe	ed below will be copied to all expenses of the same Per Diem type ecified.							
	Cost* 49.00							
	Payment Method* GOVCC-C							
Per Diem Conditions Per Diem Rates: 122.00/64.00								
Lodging Per Diem	Condition Per Diem Rates: 122.00/64.00							
Regular Lodgin     Actual Lodging     Conference All								

• Select the Accounting tab; review any accounting codes already selected for the document which are

displayed in the **Accounting Applied to TANUM** section. Use the edit (paper/pencil) icon ✓ to edit if necessary.

- For more details on using accounting codes, see Section 6 *Accounting* of this guide.
- Select the Totals tab, review the Expense Summary section.
- Select the Confirmation tab, in the Status to Apply field; verify that VOUCHER SIGNED is selected.
- Click the Stamp and Submit button.
- This action shows the items on the Pre-Audit Results for TANUM screen.
- Review the Pre-Audit list:
  - If any of the Audit Process status show as FAIL, click on the Justify Pre-Audit Results button. Correct the item(s) or enter the justification(s) in the Comments field for failed items and click the Save Justification button.
  - If all audit items show with a status of PASS or after you hit **Save Justifications**, click the **Continue Stamping the Document** button.
- Read the important text describing the impacts of legally signing this document and click the **Accept Signature Text** button.

- This completes signing/stamping the document and shows the users in the routing list. Click the **Close Post Stamping Document Closure Screen** button.
- Once approved, the voucher interfaces through FBMS for payment.

# Section 9: Special Scenarios

#### **Multi-Segment Reservations**

Travelers may sometimes need to go to more than one duty station. If no reservations are required, the traveler/arranger can easily add multiple TDY locations under the *Trip Authorization* tab of the authorization and enter the appropriate dates for each TDY location. If reservations are required, it's a little tricker and these steps are shown below.

#### How to Book Reservations for a Multi-Segment Trip

- On the *ConcurGov Home* screen, in the left navigation pane, under the **Shortcuts** section, click the **New Booking** link. Alternatively, select **Travel** on the *Menu Toolbar*.
- Click the Air/Rail 👫 tab (this is the default tab) to begin entering travel reservation information.

Note: If airfare is not needed, select the appropriate tab **car** is **, hotel** is , or **rail** to make another type of reservation.

- Select the Multi City button.
   Note: The system displays three Temporary Duty Location sections. If more TDY Locations are required, select the Add segment link in the third TDY Location section.
- Enter the first **TDY location** and click the **Find Location** button.
- In the Temporary Duty Location area, leave the default Reference Point radio button selected.
- Enter a landmark or preferably the city, state of the Temporary Duty Location.
- Click the **Find Location** button. A pop-up suggests locations based on the search information entered.
- Select the correct location from the Location drop down and click the Choose button.
- In the **TDY Per Diem Location** drop-down, select the appropriate county related to the TDY Per Diem Location.
- In the Departure City and Arrival City fields, enter the airports/airport codes related to the TDY Location.
   Note: If the Preferred Departure Airport field is updated in the traveler's profile, the Departure City field populates with that airport code.
- Select the **Departure** and **Return** date and time for the reservation. The default number of hours to search on either side of the requested time is set to 3 hours.
- In the **Departure** field, enter the date of travel to the first TDY Location.
- If a car is needed, select the **Pick-up/Drop-off car at airport** check box.
- If a hotel is needed, select the **Find a Hotel** check box.

Change the **Find hotels within** field to a distance large enough to return viable hotels options in the search, i.e. 20 miles.

Temporary Duty Location 🚱									
O Agency Location      Reference point									
e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA'									
Lakewood, CO, USA									
TDY Per Diem Location [Required]									
LAKEWOOD JEFFERSON COUNTY									
From 😧									
DCA - Ronald Reagan National Arpt - Washington, DC									
To 😧									
DEN - Denver Intl Arpt - Denver, CO									
Departure 🕜									
06/26/2016 depart ▼ 09:00 am ▼ ±3 ▼									
✔ Pick-up/Drop-off car at airport									
Find a Hotel									
Find hotels within 35 Distance Units miles 🔻 of									
Airport Address									
Agency Location     Reference Point / Zip     Code									
Reference Point / Zip Code (e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')									
Denver, CO									
With names containing:									

- In the Second Temporary Duty Location section, enter the second **TDY Location** and click the **Find Location** button.
- In the Temporary Duty Location area, leave the default Reference Point radio button selected.
- Enter a landmark or preferably the city, state of the Temporary Duty Location.
- Click the **Find Location** button. A pop-up suggests locations based on the search information entered.
- Select the correct location from the **Location** drop-down and click the **Choose** button.
- In the **TDY Per Diem Location** drop-down, select the appropriate county related to the TDY Per Diem Location.
- In the **Departure City** and **Arrival City** fields, enter the airports/airport codes related to the locations.
- Select the **Departure** date and time for the reservation. The default number of hours to search on either side of the requested time is set to 3 hours.
- If a car is needed, select the **Pick-up/Drop-off car at airport** check box.
- If a hotel is needed, select the **Find a Hotel** check box.

Temporary Duty Location @							
O Agency Location    Reference point							
e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA'							
New Orleans, LA, USA							
TDY Per Diem Location [Required]							
NEW ORLEANS ORLEANS PARISH							
From (2)							
DEN - Denver Intl Arpt - Denver, CO							
To 🕐							
MSY - Louis Armstrong Intl Arpt - New Orleans, LA							
Departure 🚱							
06/30/2016 depart ▼ 03:00 pm ▼ ±3 ▼ ×							
✔ Pick-up/Drop-off car at airport							
Find a Hotel							
Find hotels within 25 Distance Units miles v of Address							
Agency Location     ereference Point / Zip     Code							
Reference Point / Zip Code (e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')							
New Orleans, LA, USA							
With names containing:							

- In the Third Temporary Duty Location section, enter the third TDY Location and click the Find Location button.
- In the **Temporary Duty Location** area, leave the default **Reference Point** radio button selected.
- Enter a landmark or preferably the city, state of the Temporary Duty Location.
- Click the **Find Location** button. A pop-up suggests locations based on the search information entered.
- Select the correct location from the Location drop-down and click the Choose button.
- In the **TDY Per Diem Location** drop-down, select the appropriate county related to the TDY Per Diem Location.
- In the Departure City and Arrival City fields, enter the airports/airport codes related to the locations.
   Note: If there are only two TDY locations, the home airport that the traveler will be returning to should be in the Arrival City field on the last leg of the trip.
- Select the **Departure** date and time for the reservation. The default number of hours to search on either side of the requested time is set to 3 hours.

Note: If a car is needed, select the Pick-up/Drop-off car at airport check box. If a hotel is needed, select the Find a Hotel check box.

**Note:** The system displays three Temporary Duty Location sections. If more TDY Locations are required, select the **Add segment** link in the third TDY Location section.

**Note**: No matter how many TDY locations there are, always bring the traveler home as the final Arrival City.

Temporary Duty Location 🚱								
Agency Location  Reference point								
e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA'								
Washington, DC, USA								
TDY Per Diem Location [Required]								
WASHINGTON DISTRICT OF COLUMBIA								
From 🚱								
MSY - Louis Armstrong Intl Arpt - New Orleans, LA								
To 🚱								
DCA - Ronald Reagan National Arpt - Washington, DC								
Departure @								
Departure @								
Departure ②								

- Select the default **Search flights by Price** radio button to display flights by price. Optionally, select the **Specify Airline** check box to specify a specific airline for the reservation.
- Click the Search button. A pop-up displays asking to confirm that the final location for the trip is correct.
- ConcurGov propose flight options for each segment of the trip. After the flights are booked, the system displays option for booking cars and hotels for each location (if applicable).
- See Section 3 of this guide for detailed information on Creating a Travel Reservation.

## **Canceling/Changing Reservations**

Travelers may sometimes need to cancel a reservation entirely or change aspects of their trip. Contact the travel management center (TMC) to make changes to airfare after ticketing. However, many travelers are able to make pre-ticketing changes to city-pair fares. Be aware that changing a reservation may generate a fee or increased fare cost.

- On the *ConcurGov Home* screen, in the left navigation pane, under the **Shortcuts** section, click the **Upcoming Trips** link. Alternatively, select **Travel** → **Trip Library** on the *Menu Toolbar*.
- On the *Travel* tab, click the **Trip Library** link. If you see the words **Cancel Trip** under the Action column, you are able to cancel your reservations for this trip.
- If you just want to make changes to the reservation, click the name of the trip link, and then on the **Trip Actions** menu, click **Change Trip**. If Change Trip is not an option, click **Cancel Entire Trip** and rebook.
- On the itinerary, click the appropriate link to :
  - Add or modify a hotel reservation
    - Special note: when changing a hotel reservation look closely at the TDY location it is suggesting. Sometimes it is suggesting hotel location based on the airport and not the TDY location you really need.
  - Add or modify a car rental reservation

- o Modify a flight
- Cancel a reservation
- o Click Next. An updated itinerary appears once the transaction is complete.

## **Camp Rates**

DOI travelers are sometimes sent to TDY locations which do not involve traditional lodging because the traveler will be camping instead. Some or all meals may be provided which results in a reduced M&IE rate. Two special TDY locations have been added to ConcurGov called "BLM Camp Rate" or "NPS Back Country" rate. If these special rates don't apply to your bureau, you can also use the steps described in Section 5 *Expenses* or shown below to alter any M&IE rate to reflect the reduced camp rate.

- On the *Home* screen under the **Shortcuts** section, click **New** in the *Authorizations* section or you can click the *Authorizations* tab and then click **New Authorization**.
- Select a **Document Type** Authorization from the Document Type list.
- Click Create Document.
- On the *Document Information* tab, enter the required document information noted below. The **Document Type**, **Document Name**, and **Document Date** fields should pre-populate.
- In the **Type Code** drop-down list, select Trip by Trip.
- In the **Purpose** drop-down list, select the appropriate purpose code from the drop-down list.
- In the **Document Detail** field, type a detailed description of the reason for travel.
- Click on the Trip Information tab.
- In the **Depart Selection** drop-down list, select a departure location. This notates whether the traveler is departing from Residence, Duty Station, or another location.
- In the **Return Selection** drop-down list, select a return location. This notates whether the traveler is returning to Residence, Duty Station or another location.
- **Trip Duration** defaults to Multiple days, use the drop-down choice if the trip will be 12 hours or less, or 12-24 hours with or without lodging.
- In the **Comments** field, type any comments for the document, or click **Preset** to add preset comments.
- In the Arrival Date field, type or select the first day of the trip.
- In the **Departure Date** field, type or select the last day of the trip (or the last day for that TDY location).
- In the **Itinerary Location** field, enter either BLM or NPS and click Search, or use the binoculars icon to search for the TDY location.

Itin	erary l	_ocati	ons					Add mo	re rows
Row	Alerts	Delete	Arrival Date*	Departure Date*	Itinerary Location*		Purpose	ſ	Unlisted
1			04/24/20	04/30/2016	*NPS Back Country CONUS,US	$\beta$ earch Q		•	
					*NPS Back Country CONUS,US	•			

- Enter additional dates and locations if necessary.
- The individual Purpose codes are optional.
- Click the **Create Document** button.
- Click on the *Expenses & Receipts* tab.
- The first and last day of the trip may show a <sup>3</sup>/<sub>4</sub> reduction which is not correct for reduced per diem camp rates. To ensure camp rates display correctly:
  - o Click the Edit (Pencil/Paper) icon to left of the first day of M&IE

Summary	Profile G	Group	General Expense	s & Receipts Exceptions	Accounting Totals	Perform Pre-Audits Confirmation
← Previous					Clear Save	Next →
3	/ Ď Ē		04/24/2016	M&IE	15.00	Edit Expense Details
4	🖊 🖞 🖹		04/25/2016	Lodging	0.00	Copy Per Diem Expense Values and Conditions Create Expenses Through IIII 04/30/2016
5			04/25/2016	M&IE Lodging	20.00	Expense Date* III 04/24/2016 Expense Description* M&IE Cost* 20.00 USD Payment Method* REIMBURSABLE V
7			04/26/2016	M&IE	20.00	
8	1 🖉 🖊	]	04/27/2016	Lodging	0.00	
9	/ DĒ		04/27/2016	M&IE Lodging	20.00	Show Other Details
11	/ DE		04/28/2016	M&IE	20.00	Hide Per Diem Conditions Per Diem Rates: 0.00 / 20.00     These conditions apply to all per diem expenses on     04/24/2016     Regular M&IE
12	1 🖒 🚺		04/29/2016	Lodging	0.00	
13			04/29/2016	M&IE M&IE	20.00	Meals Provided     Actual Meals
14	/ D 🗉		04/30/2016	MALE	15.00	M&JE Override
← Previous					Clear Save	Next →

- Use Copy Per Diem Conditions through to change the dates to reflect the whole trip
- $\circ$  Use the **Cost** field to enter the reduced camp rate (i.e. \$20.00)
- o Click the Show Per Diem Conditions Link and choose the Actual Meals Radio button
- Click the **Save** button
- Follow the normal steps for Accounting, Confirmation, and Perform Pre-Audits.