CONCUR FAQ's

My lodging and M&IE rates don't look correct. What happened and do I need to fix it?

1. Click the Expenses tab.

WARNING!! DO NOT delete M&IE expenses or or check On Leave.

2. Adjust Lodging in accord with situation condition as follows:

Situation	Steps
No Lodging	Delete Lodging expense.
Under Per Diem	1. Click beside **Lodging**. 2. In Cost, **type the specific amount**. 3. Click **Save**.
Over Per Diem (Actuals)	1. Click beside **Lodging**. 2. Click on **Show Per Diem Conditions**. 3. Click **Actual Lodging**. 4. In Cost, **type the specific amount**. 5. Click **Save**.

To copy edits to lodging and M&IE amounts to future dates, designate the last date to apply conditions in **Copy Per Diem Conditions Through**.

3. Adjust M&IE in accord with appropriate situation as follows:

Situation	Steps
No M&IE	1. Click beside M&IE. 2. In Cost, **type zero**. 3. Click on **Show Per Diem Conditions**. 4. Click **M&IE Override**. 5. Click **Override by Amt**. 6. Click **Save**.

	Over or Under M&IE Per Diem Rate	1. Click beside M&IE. 2. In Cost, **type specific amount**. 3. Click on **Show Per Diem Conditions**. 4. Click **M&IE Override**. 5. Click **Override by Amt**. 6. In Amount, **type specific amount** again. 7. Click **Save**.
	Meals Provided	1. Click beside M&IE. 2. In Cost, **type zero**. 3. Click on **Show Per Diem Conditions**. 4. Click **Meals Provided**. 5. **Check specific meals**. 6. Click **Save**.

To copy edits to lodging and M&IE amounts to future dates, designate the last date to apply conditions in **Copy Per Diem Conditions Through**.

How Lodging and M&IE Adjusts When a TDY Location is Changed

When a per diem location is changed and saved in the itinerary, CGE updates Lodging & M&IE as follows:

- If the **M&IE rate is less** for the new location, CGE will add a M&IE Owed by Traveler expense.

Expense List

Date		Expense Description	Amount
02/24/2014		M&IE	
02/24/2014		M&IE Owed by Traveler	

This lowers M&IE to be reimbursed for the day from $45.75 to $34.50.

- If the **M&IE rate is higher** for the new location, CGE will add a M&IE Due Traveler expense.

Expense List

Date		Expense Description	Amount
02/26/2014		M&IE	
02/26/2014		M&IE Due Traveler	

This raises M&IE to be reimbursed for the day from $61 to $71.

- If the **Lodging rate is less** for the new location, CGE will add a Lodging Owed by Traveler expense.

Expense List

Date		Expense Description	Amount
02/27/2014		Lodging	
02/27/2014		Lodging Owed by Traveler	

This lowers Lodging to be reimbursed for the day from $104 to $83.

- **EXCEPTION** If the **Lodging rate is higher** for the new location, CGE does NOT correct the lodging to the higher rate. To manually correct lodging, use the following procedure:

    1. For the first date of Lodging, **click on the** .
    2. In Copy Per Diem Conditions Through, **enter the last day that lodging rate will apply**.
    3. Change **Cost to the Lodging Per Diem Rate** listed at the bottom of the Expense Details.

    4. Click **Save**.

       NOTE: If the lodging cost cannot be edited, create a Lodging Fix expense for difference. A positive amount if allowable per diem is higher or a negative number if per diem is less.

Reservations by Phone Sets Location to ALL PLACES NOT LISTED

When reservations are booked by phone, authorizations are created as follows:

- Per diem location set to ALL PLACES NOT LISTED.
- Document Information is removed.
- Lodging & M&IE is set to the domestic standard rate (83/46).

NOTE: Sometimes, an authorization resets to the above when reservations are changed.

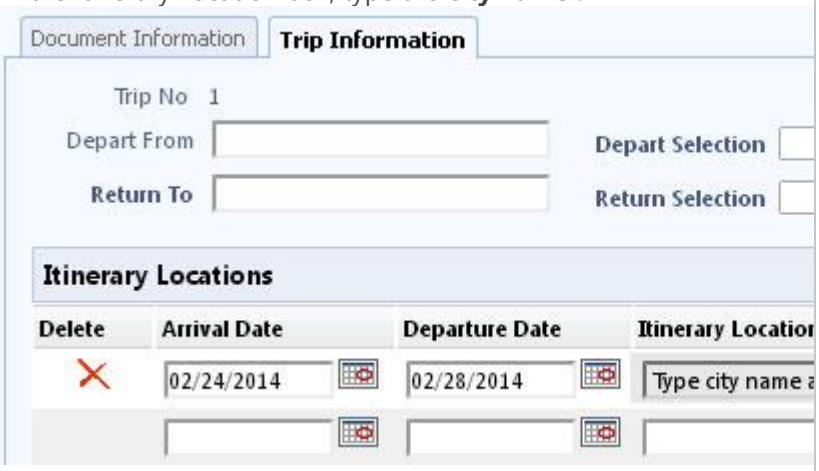
To correct these issues, use the following procedure:

1. **Open** the authorization.
2. Click on the **General** tab.
3. In the **Document Information**...

a. Designate **Type Code** and **Purpose**.

4. Click on the **Trip Information** tab.

   a. In the Itinerary Location box, type the **city name** .



   b. Click **Search**.

   c. **Select the destination** city.

   d. On the top right, check **Reset Per Diem Conditions**.

   e. Click **Save Changes**.

5. **Manually correct lodging and M&IE costs**.

How do I adjust daily costs for lodging and M&IE?

https://in-gotravel.doe.gov/docprep.html#Adjust-M&IE

Document Status Stamps

Stamp	Definition & Status
APPROVED	Document is electronically signed by all required routing officials. This stamp is required for ticketing air and rail reservations. If an authorization is stamped REJECT, it does not affect ticketing.
FUNDS OBLIGATED	Funds are obligated in STARS for travel. At this status, the authorization can be amended.
PENDING	Document data in process of uploading data to STARS. At this staus, documents are edit-locked.
REJECT	An issue in the document data requires requires intervention from the EFASC Travel Services Team to manually import into STARS. This status stamp does NOT affect approval for ticketing. Please allow 3-5 working days to resolve. If has been more than 5 working days since the document was stamped APPROVED.

How do I add descriptions to CGE?

https://in-gotravel.doe.gov/FAQ.html#AddDesc

Reservation and authorization descriptions can only be added after reservations are booked online on the Trip Booking Information page.

How do I attach receipts to a document?

https://in-gotravel.doe.gov/FAQ.html#Receipts

1. **Open** the document.
2. On the Summary tab, **scroll to the bottom** of the page.

3. To upload a PDF receipts file, click **Attach Receipt Images**.
   -or-
   To fax receipts, click **Print Fax Cover Page**.

To view the attached receipts, click **View Receipts.**

How do I activate e-receipts?

https://in-gotravel.doe.gov/FAQ.html#Ereceipts

GO Green and do a lot less scanning and faxing back at the office.

1. On the left panel under My Profile/Other Settings, click on **E-Receipt Activation**.
2. Click **E-Receipt Activation** again.
3. **Read the E-Receipt Activation and Use Agreement**.
4. Click **I Accept**.

How do I voucher for fees incurred for a cancelled trip?

https://in-gotravel.doe.gov/FAQ.html#FeesForCancelledTrip

1. **Create the voucher** from authorization.
2. **Change the trip date to 1 day - less than 12 hours**.
    a. In the voucher, click the **General** tab.
    b. Click **Trip Information**.
    c. If there are multiple locations, **delete all but the first location**.
    d. On the remaining location, **change the Departure date to the same as the Arrival Date**.
    e. Click **Save Changes**.
    f. Change *Trip Duration* to **12 hours or Less**.
    g. Click **Save Changes**, again.
3. Click the **Expenses** tab.
4. In the Delete column, **check expenses to delete**.
5. Click **Delete Selected Expenses**.
7. **Verify fees incurred are listed** in Expenses.
8. **Submit voucher** as normal for reimbursement.

6.

When I click on Print, CGE does not give me the complete document to print. What's wrong and how do I fix it?

https://in-gotravel.doe.gov/FAQ.html#PrintFix

This is a known CGE printing issue. Most of the time, it occurs anytime there is an apostrophe anywhere in the traveler profile, the travel document, or the reservations details. If the apostrophe can be removed, remove the apostrophe from the document. However, an apostrophe can't be found or can't be removed

If the apostrophe can't be found or removed, use the following workaround:

1. Click on the Review icon on the Authorizations list.
2. In the pop-up window, select the whole page.
3. Copy and paste all the page text into MS Word.

What does each of the status stamps mean?

https://in-gotravel.doe.gov/docprep.html#DocStatus

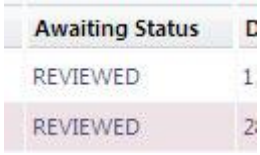
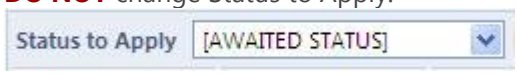
Document Status Stamps

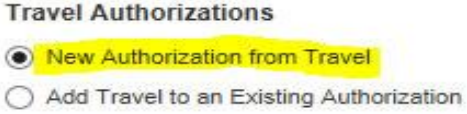
Stamp	Definition & Status
APPROVED	Document is electronically signed by all required routing officials. This stamp is required for ticketing air and rail reservations. If an authorization is stamped REJECT, it does not affect ticketing.
FUNDS OBLIGATED	Funds are obligated in STARS for travel. At this status, the authorization can be amended.
PENDING	Document data in process of uploading data to STARS. At this staus, documents are edit-locked.
REJECT	An issue in the document data requires requires intervention from the EFASC Travel Services Team to manually import into STARS. This status stamp does NOT affect approval for ticketing. Please allow 3-5 working days to resolve. If has been more than 5 working days since the document was stamped APPROVED.

How do I stamp my document SIGNED?

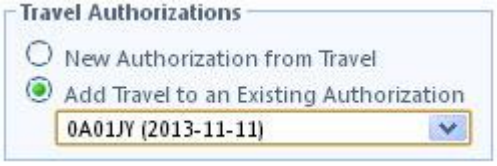
https://in-gotravel.doe.gov/FAQ.html#SIGN

1.Click on the Confirmation tab.
2.Change the Status to Apply to SIGNED. Status to Apply to SIGNED
3.Click on Stamp and Submit Document.
4.Review the Pre-Audit List.
WARNING: Do not continue stamping if there are is a HARDFAIL. To fix Purpose and Type Codes, click here. For assistance with other HARDFAILs, email travelsystemsupport@hq.doe.gov.
5.Click Justify Pre-Audit Results for Pre-Audit FAILS.
6.Click Save Justifications.
NOTE: After justifications are saved, the Pre-Audit Status does not change to PASS.
7.Click Continue Stamping the Document.
8.CGE will do a funds check.
If there are no issues, click Close Funding.

	9.On the Post Stamping, note approving officials and status stamps. 10.Click Close Post Stamping Document Closure Screen.
How do I review and stamp documents awaiting my approval?	**https://in-gotravel.doe.gov/RouteReview.html** # Route & Review Documents **Home** > **Route & Review Document** To review and stamp a document awaiting your approval, use the following procedure: 1. **Login** to CGE. 2. Click on the **Approvals** tab. 3. **Click** **to review document details**. 4. To stamp and route the document, **click** under Action. 5. Note the **Awaiting Status** column. This indicates the stamp the official will apply.  6. **Click** Preaudit & Stamp Selected Document(s). 7. Review **Pre-Audit Results**. 8. **Click** Continue Signing Document(s). 9. **DO NOT** change Status to Apply.  10. **Click** Stamp Selected Documents. 11. **Click** Close Stamping Log Screen. **NOTE:** Currently, CGE does NOW have a way to view completed documents. However, it's on CGE's list of enhancements to implement later. The workaround for viewing completed documents is granting group access to pull up documents by employee.
My authorization says FUNDS OBLIGATED, but when I go	**https://in-gotravel.doe.gov/FAQ.html#NoVoucher** To create a voucher from authorization, the authorization must be stamped APPROVED and FUNDS OBLIGATED. If an authorization has been stamped CANCELLED or the reservations embedded in the authorization were cancelled, the FUNDS OBLIGATED authorization is invalid. 1.To check the status of FUNDS OBLIGATED authorization, use the following procedure: 2.Open the authorization in View Only mode. 3.Click on the Confirmation tab.

to create a voucher from the authorization, my authorization isn't available?	4.Review the Full Document History. If the authorization was cancelled manually, a CANCEL stamp will list with a users name. If the reservations were cancelled, the action will be listed as follows: Full Document History Date/Time Status Name Remarks ... ... 02/07/2014 RESERVATIONS UPDATED Travel Auto Update Travel reservation has been cancelled for: 1000063661 ... ... To process documents for reimbursement, a new authorization needs to be created. If the invalid authorization contains the RESERVATION UPDATE - Travel reservation has been cancelled stamp, that authorization needs to be amended and stamped CANCEL before the new authorization can be stamped SIGNED.
My authorization was stamped REJECT, what do I do next?	**https://in-gotravel.doe.gov/FAQ.html#REJECT** After an authorization is stamped APPROVED, it is edit-locked in PENDING status for 2-3 working days. If there are no interface issues with STARS, the authorization will be stamped FUNDS OBLIGATED when processing is completed. If an authorization is stamped REJECT instead of FUNDS OBLIGATED, there is an issue in the document data which requires intervention from the EFASC Travel Services Team to manually import into STARS. The REJECT stamp does NOT affect the approval status for taking the trip or for air/rail ticketing. Please allow 3-5 working days to resolve. If has been more than 5 working days since the document was stamped APPROVED, please email: travelsystemsupport@hq.doe.gov the traveler's name, travel date, and TA Num.
How do I book reservations ONLINE in CGE?	**https://in-gotravel.doe.gov/reservations.html#OnlineBooking** Online Booking in CGE 1. Click on the Travel. 2. Indicate to which authorization to import reservations after booking. a. To import reservations to an **new authorization** after booking, click... 

b. To add reservations to an **existing authorization**, click...



3. **Complete the search criteria**.
   On the Air/Rail tab, check *Pick-up/Drop-off car at airport* and/or *Find Hotel* if required.

4. Click **Search** to begin browsing reservation options.

5. After selecting reservations, click **Next** until the *Trip Booking Information* page.

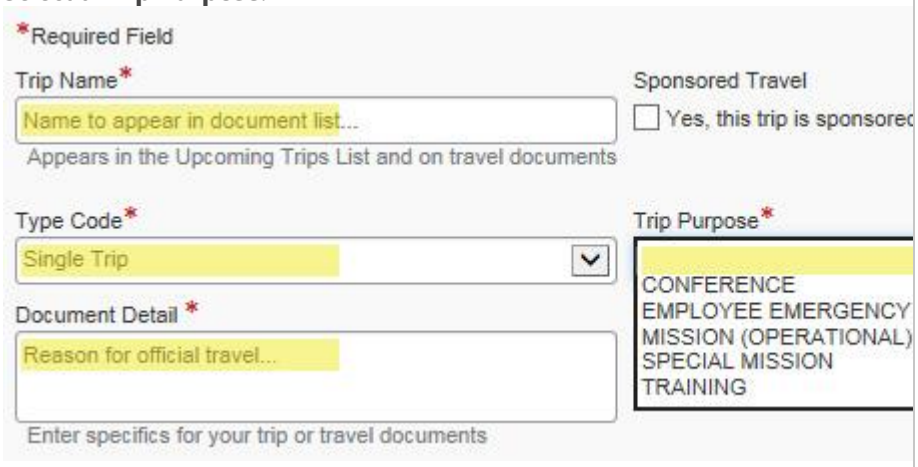
6. To **HOLD** the reservation...

   a. Note the***Hold this reservation until* date**.
   b. Click

.

7. To **CREATE an authorization** with selected reservations...

   a. Enter a more descriptive **Trip Name** or accept the default.
   b. Select a **Trip Purpose**.



   c. Click **Next**.

8. At the *Trip Confirmation* page, review all reservation details.

9. At the bottom of the page, click **Confirm Booking** to generate the authorization.
   - If changes are required, click Display Trip.
   - If *Travel Rule Violation* box opens, choose the reason for selecting the travel option.

10. In the authorization on the *Summary* page, click **Next**.

	11. On the Document Information form, **select Type Code and enter Document Description**. 12. Click on the **Next**. 13. Continue to **add expenses and complete authorization**. **Document Prepartation Tips**
Why doesn't CGE list all hotels which have rooms with GSA per diem rates?	**https://in-gotravel.doe.gov/FAQ.html#Hotels** CGE lists GSA per diem rates by offered through the Fedrooms program. However, if a hotel doesn't participate in this program, GSA per diem rates the hotel DOES offer may not be listed in CGE. If you suspect this is the case, please call the hotel directly to book rooms for official travel. FYI: In general, Marriott does not participate in the Fedroom program. However, many of their hotels offer rates at or close to GSA per diem rates. To get those rates, reservations must be booked with Marriott directly.
How do I book reservations by PHONE added to an authorization?	AdTrav etravel@adtrav.com 888-205-2369 Available 24 Hours **https://in-gotravel.doe.gov/reservations.html#BookByPhone** Booking by Phone 1. Call your DOE Travel Agency. 2. 3. Clarify you are a **CGE user**.

4. **Book reservations**.
   Your DOE Travel Agency will create an authorization in CGE with your reservation details and costs.

5. **Login** to CGE.

6. Click on **Authorizations/View Authorizations**.

7. **Open the authorization** for the departure date of your booked reservations.

8. **Complete trip itinerary information**, add other anticipated travel expenses, and submit authorization for approval.

Change Reservations

It's best to change reservations in the same way original reservations were booked. If reservations were booked by phone, make changes by phone. If reservations were booked in CGE, make the changes in CGE.

BY PHONE

- Use your **Agency Record Locator number** to initiate reservation changes by phone.
- Your travel agent will automatically update your itinerary in CGE and if the departure date is not within 5 working days of departure and still in created status, details in your authorization will also be updated.

IN CGE

1. **Open the authorization**.

> **Where is the Agency Record Locator?**
>
> It's listed in the *Trip Overview* of the itinerary and is in parenthesis in the *Subject* line of the itinerary emails.

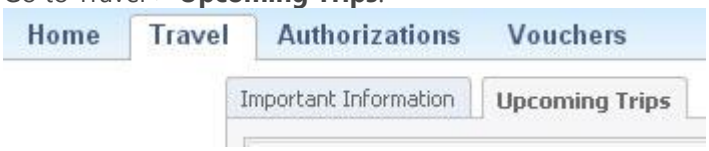
2. Click View/Change Reservations.
3. Click on the **Travel Itinerary** tab.
4. **Scroll to bottom** of the itinerary.
5. Click Change Trip

NOTE: To change any portion of an air reservation, the original air reservations need to be cancelled before new reservations are booked.

IMPORTANT NOTE: All reservations changed within 10 days of departure are NOT reflected in the authorization under Reservation Details on the Summary tab. Changes this close to departure will only be refected in the Trip Itinerary.

Cancel Trip with No Fees Incurred

1. **Cancel Trip Reservations**.

	a. Go to Travel > **Upcoming Trips**.  b. Click on **Cancel Trip**. 2. **Delete or stamp the authorization CANCELLED**. 1. Go to **Authorizations**. 2. If exists, click on the **Red X**. 3. If X is gray, open the authorization in edit mode and **stamp it CANCELLED**. **Voucher for Fees Incurred on a Cancelled Trip**
I booked reservations by phone, but the expenses were not added to my authorization. How do I add my reservations to my authorization?	**https://in-gotravel.doe.gov/FAQ.html#AddRes** Click on the Home tab and complete the following: 1.Under I Want To, click Create an authorization from an Agent-booked trip. 2.At Record locator to import , enter your reservation locator number. 3.Click Submit.