



Creating Local Travel Claims

Creating a local travel claim allows you to request reimbursement for local travel.

See *UG50 – Creating Local Travel Claims* for more detailed information on this process.

Getting Started

1. Click **My E2** on the task bar.
2. Select *Create Local Travel Claim* from the **Start a Travel Document** list.



Figure 1: Start a Travel Document — Create Local Travel Claim option

3. Click **Go**.

Completing Basic Information

1. Enter or select the following on the Local Travel Basic Information page.
 - Specific Travel Purpose
 - Begin and End Dates
 - Type of Travel
2. Click **Save and Next Step**.

Completing Expenses

Use the Local Travel Expenses page to add estimated expenses to your local travel claim.

1. Click the **Add New Expense** link. This displays the Add New Expense window.



Figure 2: Local Travel Claim — Add New Expense

2. Complete the required (*) fields. The fields vary based on the type of expense you enter. The following fields appear for all expense types.

- **Date of Expense** – The date the expense was incurred.
- **Expense Type** – Select the type of expense from the list. This list is limited to the expense types you are allowed to claim for local travel.

NOTE: If you selected an expense type of POV, select the **Subtype** from the list, enter the **From** and **To** destinations, and enter the **Distance** in miles or kilometers.

- **Pay To** – Select the entity that paid for the expense (and should be repaid), such as traveler, travel charge card, or agency billed.
- **Remark** – Click **Add an Optional Remark** to add comments about this specific expense.
- **Receipt** – Click **Add Receipt** to select a receipt or other documentation and attach it to the expense.

3. Save the expense.
 - Click **Save and New** to add the expense and leave the window open to add other expenses.
 - Click **Save and Close** to add the expense and close the window.
4. Click **Next Step**.

Completing Accounting Information

The Local Travel Accounting page is used to select the accounts used to cover the claimed expenses. Your Funds Manager will add the POET lines required to fund the claim during the approval process. You can skip this step by simply clicking **Save and Next Step**.

Completing the Summary Step

The Summary page displays your local travel claim information.



Figure 3: Local Travel Summary page

1. Review the claim. Click the **Edit Details** link in a section header to return to that step and make changes.
2. Click **Send to Approver**. A Confirm Action window displays.
3. Click **Confirm**.

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