



USCG UG50: Creating Local Travel Claims

Requesting Reimbursement for Local Travel
Release 22.1 | January 2022



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1 Introduction

This document contains information regarding the local travel claim process for E2 Solutions users utilizing both Federal Travel Regulations (FTR) and Joint Travel Regulations (JTR). Features and options specific to JTR functionality will be indicated when possible.

1.1 *Understanding Local Travel Claims*

In E2 Solutions (E2), a local travel claim is generally considered to be an accounting of business expenses that you incurred while conducting official business in the area (typically, within a 50-mile radius) of your local permanent duty station (home site). A local travel claim can include expenses for up to 60 days. This user guide covers the creation and submittal process for local travel (LT) claims.

When you create a local travel claim, you are requesting reimbursement for your local travel expenses, so a local travel claim is considered a type of voucher in E2. While this document and the local travel user interface (UI) primarily use the term *claim*, you may see the term *voucher* used as well. For example, when you create a local travel claim, the status is set to *Open Voucher*. After you submit the claim for approval, the status changes to *Pending Voucher Approval*. "Local travel claim" and "local travel voucher" are just two different names for the same document, and can be used interchangeably.

2 Creating a Local Travel Claim

Select one of the following options to create a local travel claim:

- Select *Create Local Travel Claim* from the **Start a Travel Document** list on the My E2 **At a Glance** tab, and then click **Go**.
- Click **Start a New Claim** on the My E2 **Local Travel** tab.

Either option takes you to the Basic Information page, which is the first step in the local travel claim process.

3 Completing the Basic Information Step

The Basic Information step is the first step in the local travel claim workflow. This page requires you to enter the minimum amount of information needed for E2 to create the local travel claim and to assign a document number to that claim, including:

- Travel purpose and official travel type
- Dates covered by the local travel claim (begin and end dates)
- Document number

Figure 1: Local Travel Basic Information page

Complete the following steps.

1. Select the type of travel for which you are creating the claim from the **Type of Travel** drop-down list.
2. Enter the purpose of your trip(s) in the **Specific Travel Purpose** field.
3. Establish the dates of the claim. A local travel claim can cover up to 60 days.

- a. Enter the starting date of the claim in the **Begin Date** field (formatted DD-MMM-YYYY), or click the calendar icon to select the date from the drop-down calendar.

NOTE: If you enter the date in another format (e.g., MM-DD-YYYY), E2 will convert it to the appropriate format. Verify the converted date is what you expect.

- b. Enter the ending date of the claim in the **End Date** field, or click the calendar icon to select the day from the drop-down calendar.

TIP: You can create a claim for up to 60 days in the future, but you cannot actually submit the claim for approval until the end date is past.

4. Click **Save and Next Step** to create the claim, assign an ID (displayed in the header), and move to the next step in the process. Once the claim is created, the claim status (also shown in the header) changes to *Open Voucher*, and the Expenses page displays.

4 Completing the Expenses Step

Use the Local Travel Expenses page to add expenses to your claim. The system automatically add a voucher transaction fee (VTF), which you will see as a listed but non-editable expense.

Step 2 : Local Travel Expenses

Traveler Name: CARLOS GARCIA Local Claim ID: LT-0051229 Voucher Type: Claim Claim Status: Open Voucher

Expense Information

Travel Charge Card: 6.90
Amount: 6.90

Order by:

Date	Type	Amount	Description	Pay To	Alerts	Modify	Copy	Delete
07-Jan-2022	Voucher Transaction Fee	6.90	Voucher Transaction Fee	Travel Charge Card				

Showing 1 - 1 of 1

Attachment: Remark: Reduced: Credit Card:

[Add New Expense](#)
[Add Credit Card Expense](#)

 [Back to Step 1: Basic Information](#)

Figure 2: Local Travel Expenses page

Complete the following steps.

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

Add New Expense

Date of Expense:*

Expense:*

Amount:*

Description:

Remark: [Add an Optional Remark](#)

Receipt: [Add Receipt](#)

Size Limit: 10 Megabytes - Allowed Types: PDF,JPG,JPEG,GIF,TIFF,TIF,PNG,BMP,XLS,XLSX,DOC,DOCX,TXT

*Required

Figure 3: Local Travel Claim — Add New Expense

2. Complete the required (*) fields. The fields available in the Add New Expense window vary based on the type of expense you select.
 - **Date of Expense** – Enter the date the expense was incurred in the field, or click the calendar icon to select the date from the drop-down calendar. The field defaults to the date selected for the **Begin Date** field on the Basic Information page.

- **Expense** – Select the type of expense (e.g., parking, registration fees, personal vehicle (POV)) you are adding to the local travel claim from the drop-down list.
- **Amount** – Enter the amount (0.01–99999.99) of the expense.

*TIP: If you do not enter decimal places in the **Amount** field, E2 assumes your entry is a whole dollar amount. For example, if you enter 45, E2 converts the value to 45.00.*

- **Pay To** – Select the method of reimbursement for the expense (e.g., traveler, travel charge card, agency billed) from the drop-down list.
- **Remark** – Click the **Add an Optional Remark** link to add comments about this specific expense. Enter your comments in the **Remark** field.
- **Receipt** – Click the **Add Receipt** link to attach a receipt or other document to this specific expense. Select the file from the system's Choose File window, and then click **Open**. The file is uploaded and the file name displays in the **Receipt** field.

*TIP: If you decide that you do not want to attach the file to the expense, click the **Delete** link to the right of the **Receipt** field. This is your first opportunity to delete the file. You will, however, be able to delete attachments as long as you have edit privileges for the document.*

3. Complete your actions.

- Click **Save and New** to add the expense and refresh the window so you can add another expense. A success message displays at the top of the window and the fields revert to their default values.
- Click **Save and Close** to add the expense, close the Add New Expense window, and return to the Local Travel Expenses page. A success message displays in the message area and your newly added expense appears in the expense list.

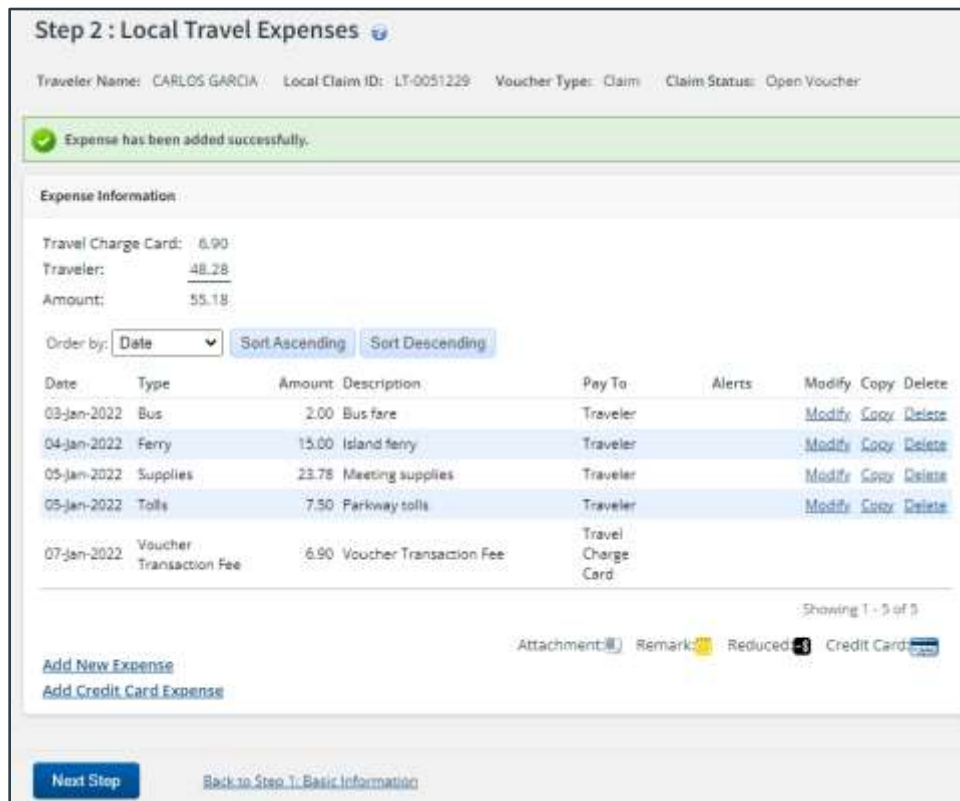


Figure 4: Local Travel Expenses — Added Expense

- Click **Exit Window** to abandon your entries, without saving the expense, close the window and return to the Local Travel Expenses page.
4. Click **Next Step** to move to the next step in the process. The Local Travel Accounting page displays.

4.1 Making Changes to Expenses

If the local travel claim has a status of *Open Voucher*, you can make changes to the expenses that have been entered. This section covers:

- Editing expense details
- Adding remarks to an existing expense
- Attaching receipts to an existing expense
- Creating new expenses by copying existing expenses
- Deleting expenses.

4.1.1 Edit Expense Details

Complete the following steps to edit the details of a particular expense.

TIP: You can make changes to all of the expense fields except for the **Expense Type** field. If you need to change the expense type, delete the existing expense, and then add a new expense with the correct expense type.

1. Locate the expense in the list on the Local Travel Expenses page.
2. Click the **Modify** link. This displays the Edit Expense window, which defaults to the **Detail** tab.

The screenshot shows a web form titled "Edit Expense - Tolls for \$7.50 on 05-Jan-2022". At the top, there are three tabs: "Detail" (which is selected and underlined), "Remarks", and "Receipts". Below the tabs, the form contains the following fields:

- Date of Expense:***: A text box containing "05-Jan-2022" with a calendar icon to its right.
- Expense:**: A text box containing "Tolls".
- Amount:***: A text box containing "7.50".
- Description:**: A text box containing "Parkway tolls".
- Pay To:***: A dropdown menu with "Traveler" selected.

At the bottom left, there is a note "*Required". At the bottom right, there are three buttons: "Save and Close" (in a dark blue box), "Save" (in a light blue box), and "Exit Window" (in a light blue box).

Figure 5: Local Travel Claim — Edit Expense, Detail tab

3. Make your changes. The fields available on the **Detail** tab vary, based on the type of expense you are changing.
4. Click **Save and Close** to save your changes, close the Edit Expense window, and return to the Expenses page.

4.1.2 Add Remarks to an Existing Expense

Complete the following steps to add remarks to an existing expense.

1. Locate the expense in the list on the Local Travel Expenses page.
2. Click the **Modify** link. This displays the [Edit Expense window](#), which defaults to the **Detail** tab.
3. Click the **Remarks** tab. Any existing remarks for the expense will display on the tab.

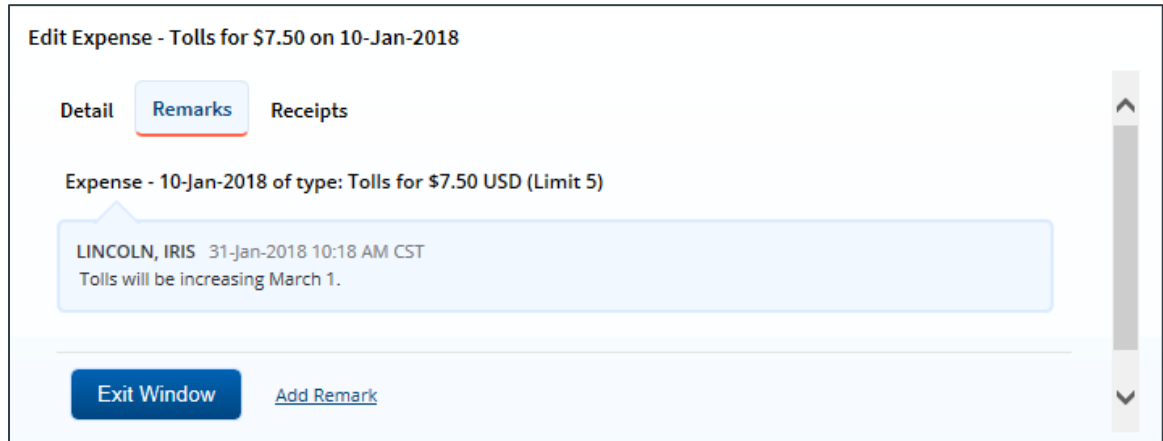


Figure 6: Edit Expense — Remarks tab, Existing remark

4. Click the **Add Remarks** link. Existing remarks are replaced by a text entry field.

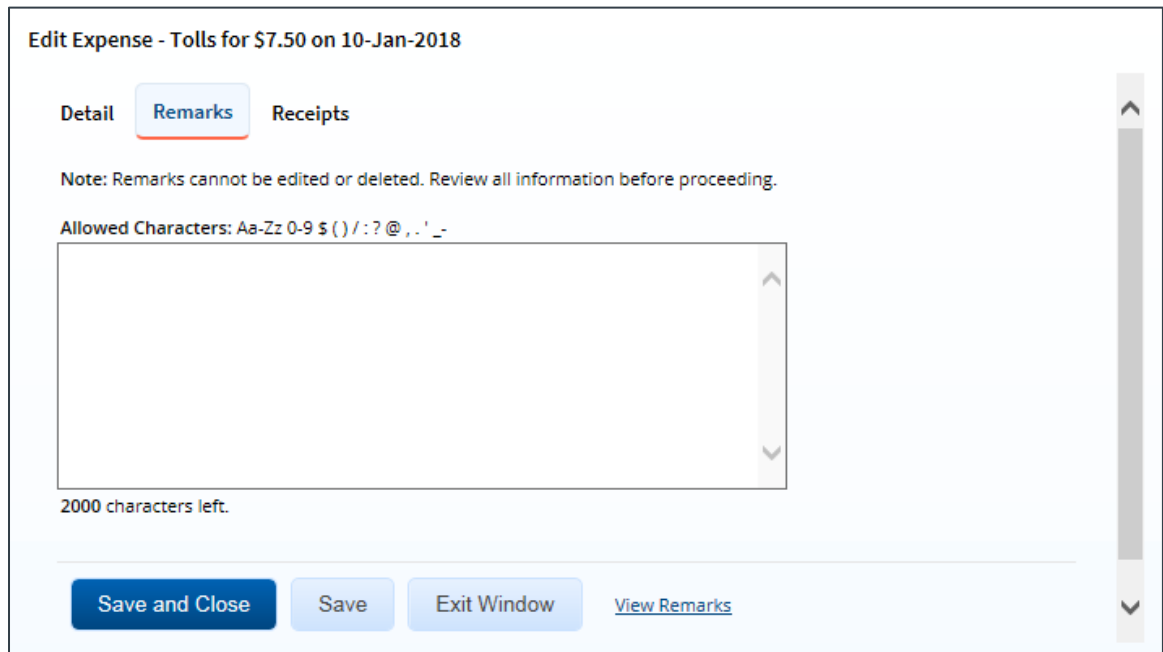


Figure 7: Edit Expense — Remarks tab, Add a Remark

5. Enter your remarks in the text box and review them. Remarks cannot be edited or deleted after you save them; make any changes before saving.

TIP: Avoid copying and pasting text from other applications. Doing so may result in invalid character errors.

- Click **Save and Close** to save your changes, close the Edit Expense window, and return to the Expenses page.

4.1.3 Attach Receipts to an Existing Expense

Complete the following steps to attach a receipt or other documentation to an existing expense.

- Locate the expense in the list on the Local Travel Expenses page.
- Click the **Modify** link. This displays the [Edit Expense window](#), which defaults to the **Detail** tab.
- Click the **Receipts** tab. Any documents already attached to the expense will display on the tab.

Edit Expense - Parking for \$35.00 on 11-Jan-2018

Detail Remarks Receipts

Add New Receipt

[Add Receipt](#)

Size Limit: 10 Megabytes - Allowed Types:
PDF, JPG, JPEG, GIF, TIFF, TIF, PNG, BMP, XLS, XLSX, DOC, DOCX, TXT

File Name	Date Attached	Attached By	Show	Delete

Exit Window

Figure 8: Edit Expense — Receipts tab

- Click the **Add Receipt** link. This displays your computer's standard Choose file window.
- Select the PDF file to attach to the expense.
- Click **Open**. A success message displays on the **Receipts** tab when the document is successfully attached to the expense, and the new document displays in the list on the tab.

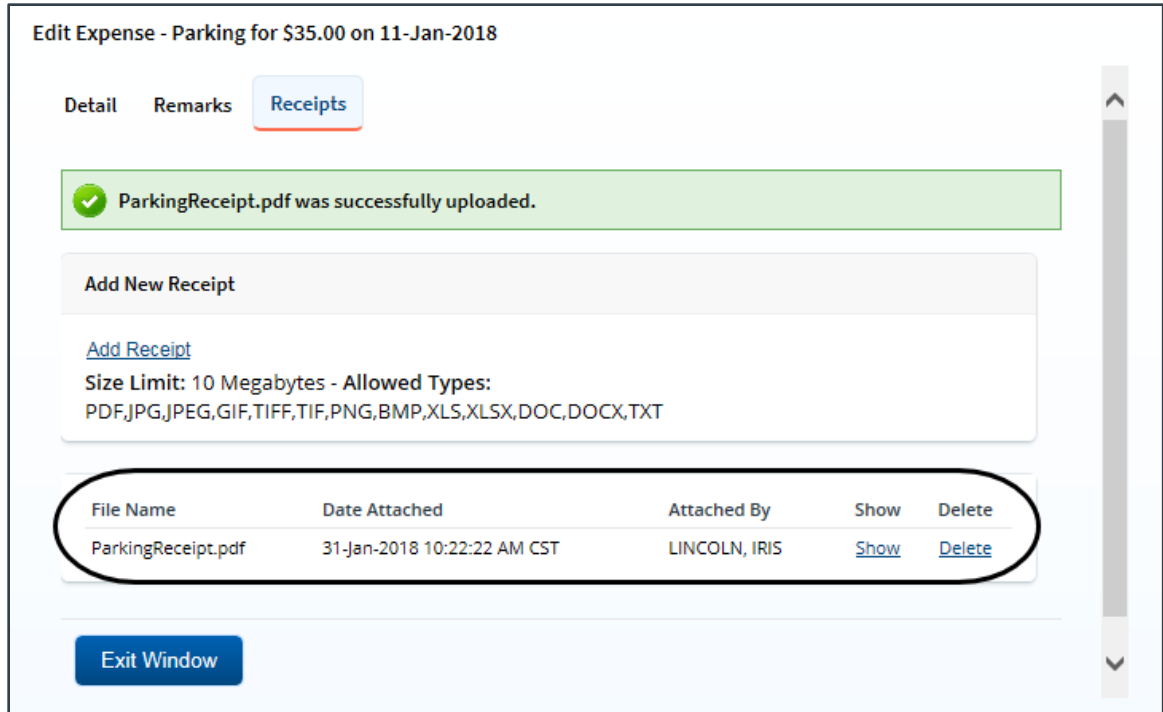


Figure 9: Edit Expense — Receipts tab, Attached Receipt

7. Click the **Show** link to view the document.

TIP: If this is not the document you want to attach to the expense, click **Delete** to remove it. You are able to delete attached receipts at any time prior to the local travel claim's final approval, as long as you have edit privileges for the document. Adding and deleting receipts will add entries to the Claim History file.

8. Click **Exit Window** to close the Edit Expense window and return to the Expenses page.

4.1.4 Copy an Existing Expense

If you incurred the same expense on several different days, you can simplify the task of adding each expense to the local travel claim by adding the expense for one day, and then copying that expense to other days.

NOTE: Remarks and receipts associated with the original expense are not copied to the new expense.

Complete the following steps.

1. Locate the expense you want to copy in the list on the Local Travel Expenses page.
2. Click the **Copy** link. This displays the Copy Expense window.

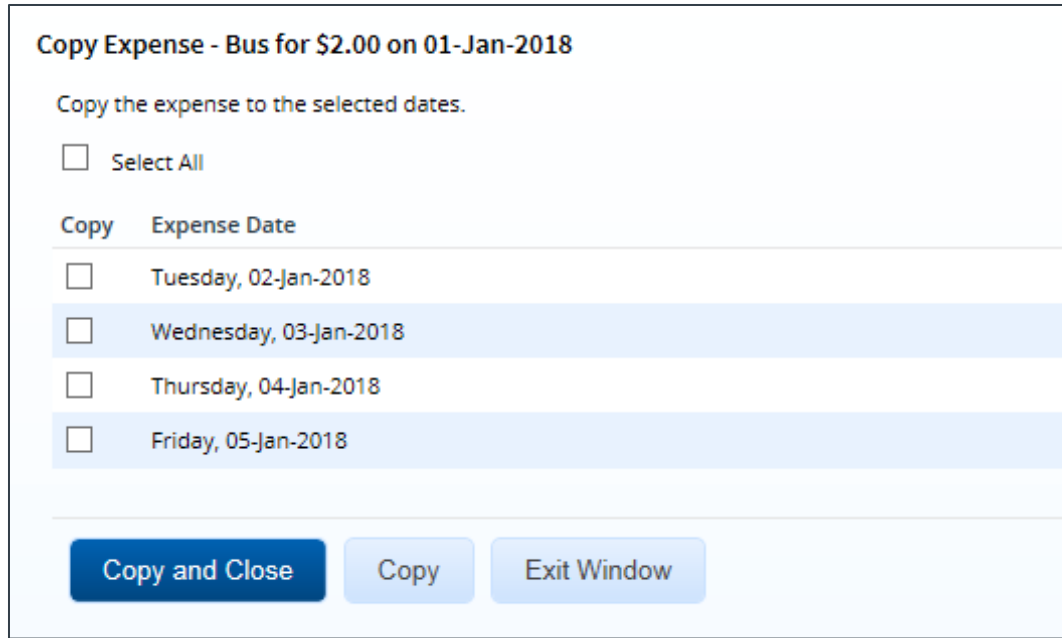


Figure 10: Copy Expense window

3. Select the **Copy** check box for each day to which you want to copy the expense.
 - You can copy the expense to one or more other dates on the local travel claim.
 - Select the **Select All** check box to copy the expense to all other dates covered by the claim.
4. Click **Copy and Close** to copy the expense to the selected dates and close the Copy Expense window. The new expenses are displayed in the list on the Expenses page.

4.1.5 Delete an Existing Expense

If you added an expense in error, click the **Delete** link for that expense (on the Expenses page) to delete the expense from the local travel claim. The expense is automatically removed from the claim.

NOTE: You can only delete an expense from a claim with a status of Open Voucher. A claim has an Open Voucher status if it has not yet been submitted for approval, or if it has been returned to you by an approver for revision. If the claim has a status of Pending Approval, has been paid, or a reclaim local travel voucher exists, no changes are allowed.

Date	Type	Amount	Description	Pay To	Alerts	Modify	Copy	Delete
01-Jan-2018	Bus	2.00	Bus fare	Traveler		Modify	Copy	Delete
01-Jan-2018	Ferry	15.00	Island ferry	Travel Charge Card		Modify	Copy	Delete
01-Jan-2018	Minor Purchases	14.78	Customary gifts	Traveler		Modify	Copy	Delete
01-Jan-2018	Tolls	7.50	Parkway tolls	Travel Charge Card		Modify	Copy	Delete
31-Jan-2018	Voucher Transaction Fee	0.00	Voucher Transaction Fee	Agency Billed				

Figure 11: Local Travel Expenses — Delete link

WARNING: You are **NOT** prompted to confirm your action when you click **Delete**. If you delete an expense in error, you must re-add it to the local travel claim as a new expense.

4.2 Select Travel Charge Card Transactions as Expenses

USCG supports an automated travel charge card (TCC) process through which you are able to select travel charge card transactions that reflect purchases made using your GTCC.

Use the **Add Credit Card Expenses** link on the Local Travel Expenses page to view your TCC transaction list and select those transactions relevant to this claim.

Expense Information

Travel Charge Card: 6.90
 Traveler: 48.28
 Amount: 55.18

Order by: Date Sort Ascending Sort Descending

Date	Type	Amount	Description	Pay To	Alerts	Modify	Copy	Delete
03-Jan-2022	Bus	2.00	Bus fare	Traveler		Modify	Copy	Delete
04-Jan-2022	Ferry	15.00	Island ferry	Traveler		Modify	Copy	Delete
05-Jan-2022	Supplies	23.78	Meeting supplies	Traveler		Modify	Copy	Delete
05-Jan-2022	Tolls	7.50	Parkway tolls	Traveler		Modify	Copy	Delete
07-Jan-2022	Voucher Transaction Fee	6.90	Voucher Transaction Fee	Travel Charge Card				

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Attachment: Remark: Reduced: Credit Card:

[Add New Expense](#)
[Add Credit Card Expense](#) ←

Figure 12: Local Travel Expenses — Add Credit Card Expense link

4.2.1 Add a TCC Transaction as an Expense

Complete the following steps.

1. Click the **Add Credit Card Expense** link. This displays the Add Credit Card Expense window, which lists all of the TCC transactions that are currently available for assignment as an expense.

TIP: If you are looking for a recent transaction that does not appear on the list, try again later. Transactions are provided to E2 by the travel charge card vendor on a scheduled basis. You can always add the expense to the local travel claim manually without waiting for the transaction.

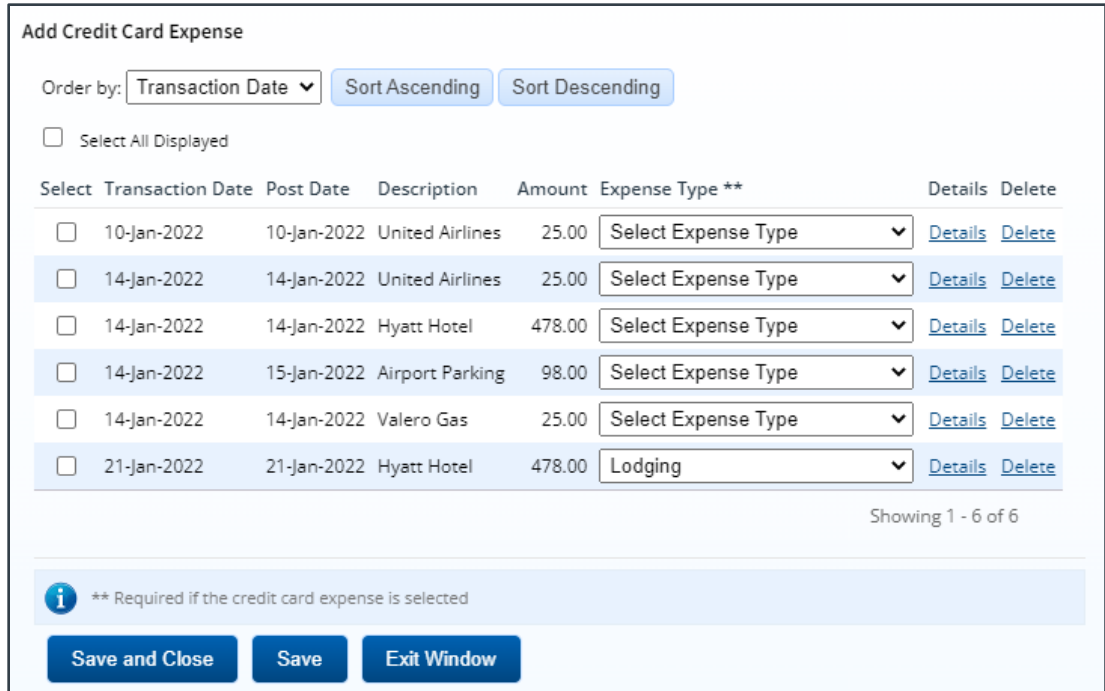


Figure 13: Add Credit Card Expense window

2. Click the **Select** check box of the travel charge card transaction that you want to add to the claim.
3. If necessary, select the appropriate expense type from the **Expense Type** drop-down list. The expense type that displays by default reflects a mapping established by your agency, if available.
4. Click **Details** to verify other expense details. This displays the Credit Card Expense Detail window.

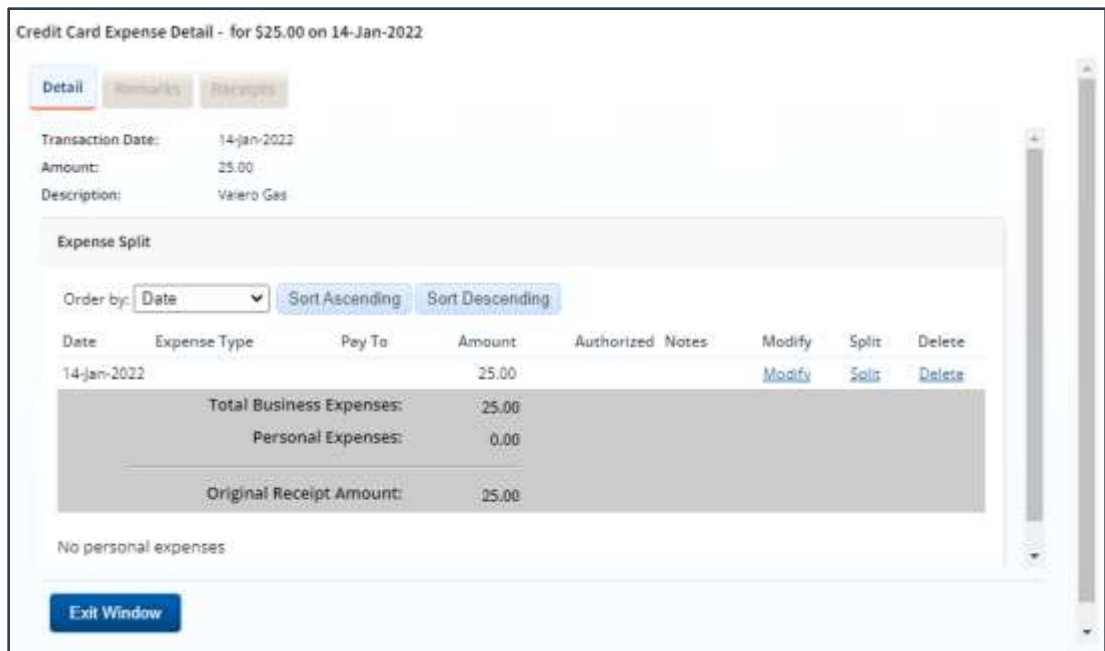



Figure 14: Credit Card Expense Detail window

- Click **Modify** to [change any of the expense details](#) (e.g., date, expense type, entity to be reimbursed (Pay To), or amount).
 - Click **Split** to split the expense into a daily charge for multiple days.
5. Click **Exit Window** to close the Credit Card Expense Detail window and return to the Add Credit Card Expense window.
 6. Click **Save and Close** to close the Add Credit Card Expense window. The transaction is added to the list of expenses on the Local Travel Expenses page. A credit card icon () displays in the expense's Alerts column.

Expense Information						
Travel Charge Card:	6.90					
Traveler:	48.28					
Amount:	55.18					
Order by:	Date	Sort Ascending		Sort Descending		
Date	Type	Amount	Description	Pay To	Alerts	Modify Copy Delete
03-Jan-2022	Bus	2.00	Bus fare	Traveler		Modify Copy Delete
04-Jan-2022	Ferry	15.00	Island ferry	Traveler		Modify Copy Delete
05-Jan-2022	Supplies	23.78	Meeting supplies	Traveler		Modify Copy Delete
05-Jan-2022	Tolls	7.50	Parkway tolls	Traveler		Modify Copy Delete
07-Jan-2022	Voucher Transaction Fee	6.90	Voucher Transaction Fee	Travel Charge Card		

Showing 1 - 5 of 5

Attachment:  Remark:  Reduced:  Credit Card: 

[Add New Expense](#)
[Add Credit Card Expense](#)

Figure 15: Local Travel Expenses — Credit Card icon


4.2.2 Modify an Expense

When you select a transaction and add it as an expense, you can make changes before the expense is added to the local travel claim. For example, you can change the date of the expense or, if the transaction includes some non-reimbursable expense, reduce the amount of the transaction associated with the expense.

With the [Credit Card Expense Detail window](#) displayed, complete the following steps to modify expense detail.

1. Click the **Modify** link. This displays the Edit Daily Expense window.

Edit Daily Expense

Date:* 

Expense Type:* ▼

Pay To:* ▼

Amount:*

*Required

Figure 16: Edit Daily Expense window

2. Make your changes.
 - Enter the actual expense date in the **Date** field, or click the calendar icon to select the date from the drop-down calendar.
 - Select the expense type from the **Expense Type** drop-down list.
 - Select the entity to be reimbursed for the expense from the **Pay To** drop-down list.
 - Enter the actual amount of the expense in the **Amount** field.
 - If you reduce the amount of the expense, the remaining balance of the TCC transaction is tagged as a personal expense. The personal expense amount can be associated with another expense on the local travel claim.
 - A personal expense amount cannot be associated with expenses on a different local travel claim or voucher. A transaction can only apply to a single voucher or local travel claim.
3. Click **Save and Close** to save your changes and close the Edit Daily Expense window.

4.2.3 Correct Mistakes

If you assign a TCC transaction to an expense in error, you can delete the expense from the list on the Local Travel Expenses page, or you can deselect the transaction to return it to your available TCC transactions list.

4.2.3.1 Expenses Page

When you delete the expense from the list on the Expenses page:

- If the expense represents the total TCC transaction, the transaction will be returned to the available TCC transactions list, and will be available for selection again.
- If the expense represents part of a TCC transaction, the amount of the deleted expense will be marked as a personal expense. You can return to the TCC transaction [and assign the personal expense amount to another expense](#).

4.2.3.2 Deselect the Transaction

Complete the following steps to deselect the transaction.

1. Click the **Add Credit Card Expense** link on the Local Travel Expenses page.
2. Clear the **Select** check box for each expense you selected in error.
3. Click **Save and Close**.
4. Review your expense list to verify all expenses are now correct.

4.2.4 Remove a Transaction from the List

You can remove a TCC transaction from the available transactions list. This action tags the transaction as a non-reimbursable expense, and removes it from the available transactions list. (It will not be available to you from any other voucher or local travel claim.)

Complete the following steps.

1. Click the **Add Credit Card Expense** link on the Local Travel Expenses page.
2. Locate the transaction on the list.
3. Click **Delete**. This displays a Confirm Action window.
4. Click **Confirm**.

4.2.5 Make Changes from the Expense List

After you add the TCC transaction as an expense, it displays in the list of expenses on the Local Travel Expenses page, like all other expenses that you added individually to the claim. You can make the following adjustments:

- Change the expense date
- Split the total charge between multiple expenses
- Split the total charge over multiple days
- Change the amount

Complete the following steps.

1. Locate the expense in the list on the Local Travel Expenses page.
2. Click **Modify**. This displays the Credit Card Expense Detail window.
3. Make the necessary changes.
 - Click **Modify** to make changes to the amount, date, or method of reimbursement.
 - Click **Split** to split the expense across multiple days.
 - Click **Split Personal Expenses** to assign any portion of the expense currently tagged as non-reimbursable (i.e., personal expense) to another reimbursable E2 expense type.
 - To tag the complete expense as personal, click **Delete**, and then click **Confirm**. If this was the last detail line, the entire transaction is marked as personal, and the transaction is no longer available for selection from the available TCC transaction list.
4. [View or add remarks and receipts](#).
 - Click the **Remarks** tab to view or add remarks to the TCC expense.
 - Click the **Receipts** tab to view, attach, or delete receipts for the TCC expense.
5. Click **Save and Close** to save your changes and close the Credit Card Expense Detail window.

4.2.6 Delete an Expense Associated with a TCC Transaction

You can delete an expense in several ways.

NOTE: *If you delete a local travel claim that includes TCC expenses, the TCC transactions are returned to the list of available transactions. You can associate the transactions with expenses for another voucher or local travel claim.*

4.2.6.1 Expenses Page

Delete the expense from the list of expenses on the Expenses page of the workflow by locating the expense in the list, and then click the [Delete link](#).

If you delete an expense associated with a TCC transaction from the Expenses page, it is either returned to the available TCC transactions list, or it becomes a personal expense portion of a split transaction.

- If the original TCC transaction was split over multiple expenses, you can return to the transaction list and assign the remaining amount of the transaction to another expense. If the deleted expense was the last reimbursable detail for a split transaction, the entire TCC transaction is returned to the available TCC transaction list.

- If the deleted expense represented the entire TCC transaction, that transaction is returned to the available TCC transactions list. You can select it and assign it to an expense on this document, or another voucher or local travel claim.

4.2.6.2 Deselect the Transaction

Delete the expense by [deselecting the transaction](#) to return it to your available TCC transactions list.

4.2.6.3 Remove the Transaction

Delete the expense by [removing the associated transaction](#) from the TCC transaction list.

4.2.6.4 Credit Card Expense Detail

Delete the expense from the Credit Card Expense Detail window. Refer to [Make Changes from the Expense List](#) for more information.

- If you delete an expense detail line, the amount is marked as a personal expense, and you can assign all or part of that amount to another expense on the local travel claim or voucher.
- If you delete the final detail line from the Credit Card Expense Detail window, the entire transaction is marked as a personal expense and it is removed from the available TCC transactions list.

5 Completing the Accounting Step

Your Funds Manager will add the accounting code require to fund the local travel claim. Click the **Save and Next Step** button on the Local Travel Accounting page to continue to the next step in the workflow.

Step 3 : Local Travel Accounting ?

Traveler Name: IRIS LINCOLN Local Claim ID: LT-0135301 Claim Status: Open Voucher

! No account codes selected. Click the 'Select Account Codes' link below to add an account code.

Accounting

i No account codes selected.

[Select Account Codes](#) ↗

Save and Next Step **Save** [Back to Step 2: Expenses](#)

Figure 17: Local Travel Accounting page

6 Completing the Summary Step

The Local Travel Summary page allows you to review the local travel claim and make sure it is correct before you submit it for approval. All sections on the Local Travel Summary page are expanded by default.

Step 4 : Local Travel Summary 🔍

Traveler Name: CARLOS GARCIA Local Claim ID: LT-0051229 Voucher Type: Claim Claim Status: Open Voucher

📘 In accordance with Federal regulations all single receipts greater than \$75.00 should be retained for a period of 6 years and 3 months.
 collapse or expand all sections

Basic Information - [Edit Details](#) ⌆

Type of Travel: OFFICIAL MEETINGS (P2)
 Specific Travel Purpose: Local meetings
 Begin Date: 03-Jan-2022
 End Date: 07-Jan-2022
 Document Number: (System Assigned)

Expenses - [Edit Details](#) ⌆

Travel Charge Card: 6.90
 Traveler: 48.28
 Amount: 55.18

Order by: Date Sort Ascending Sort Descending

Date	Type	Amount	Description	Pay To	Alerts	Show
03-Jan-2022	Bus	2.00	Bus fare	Traveler		Show
04-Jan-2022	Ferry	15.00	Island ferry	Traveler		Show
05-Jan-2022	Supplies	23.78	Meeting supplies	Traveler		Show
05-Jan-2022	Tolls	7.50	Parkway tolls	Traveler		Show
07-Jan-2022	Voucher Transaction Fee	6.90	Voucher Transaction Fee	Travel Charge Card		

Showing 1 - 5 of 5

Attachment: Remark: Reduced: Credit Card:

Accounting - [Edit Details](#) ⌆

📘 No account codes selected.

Remarks - [Edit Details](#) ⌆

📘 No remarks found.

Receipts and Attachments - [Edit Details](#) ⌆

Attached Documents

📘 No receipts or attachments found.

Send to Approver
Back to Step 3: Accounting

Figure 18: Local Travel Summary page

Complete the following steps to submit the local travel claim for approval.

1. Review the information in each section. If you need to make changes, click the **Edit Details** link in the section header to return to that workflow step.
2. When you are finished, scroll to the bottom of the page and click **Send to Approver**. This displays a Confirm Action window.

***TIP:** If there are errors that prevent the local travel claim from being submitted for approval, warning and error messages display at the top of the Summary page. Fix the problem(s), and then click **Send to Approver** again.*

3. Read the acceptance policy listed in the Confirm Action window. Your acceptance of any policy statements is logged in document history.
4. Click **Confirm**. If the claim passes all validation, it is submitted for approval.

7 Other Actions Available

The following tasks can be performed before you submit the local travel claim for approval:

- [Add remarks](#)
- [Attach supporting documentation](#)
- [Print the claim](#)
- [View claim history](#)
- [View the approval path](#)
- [View routing history](#)
- [View payments](#)

7.1 Add Remarks

Although you can add comments to specific expenses, you may also want to add a remark associated with the local travel claim as a whole. Complete the following steps.

1. Click the **Remarks** link in the Other Actions section. This displays the Remarks window, which shows any remarks already associated with the claim.

Remarks for LT-0135302

[View Remarks](#) **Add Remarks**

Local Travel Remarks - Local Travel ID: LT-0135302

LINCOLN, IRIS 31-Jan-2018 10:30 AM CST
I hereby assign to the United States any right I may have against any parties in connection with reimbursable transportation charges described below, purchased under cash payment procedures (41CFR 101-41.203-2). I certify that this voucher is true and correct to the best of my knowledge and belief, and that payment or credit has not been received by me.

Expense - 10-Jan-2018 of type: Tolls for \$7.50 USD (Limit 5)

LINCOLN, IRIS 31-Jan-2018 10:18 AM CST
Tolls will be increasing March 1.

Exit Window

Figure 19: Remarks — View Remarks tab for a local travel claim

2. Click the **Add Remarks** tab.
3. Enter your remarks and review them. Remarks cannot be edited or deleted after you save them; make any changes before saving.

TIP: Avoid copying and pasting text from other applications. Doing so may result in invalid character errors.

- Click **Save and Close** to save your remarks and close the Remarks window.

7.1.1 Viewing Remarks

The Remarks section on the Local Travel Summary page shows all expense remarks and general remarks associated with the claim. Click the **Expand Remarks** link to view all remarks without scrolling.

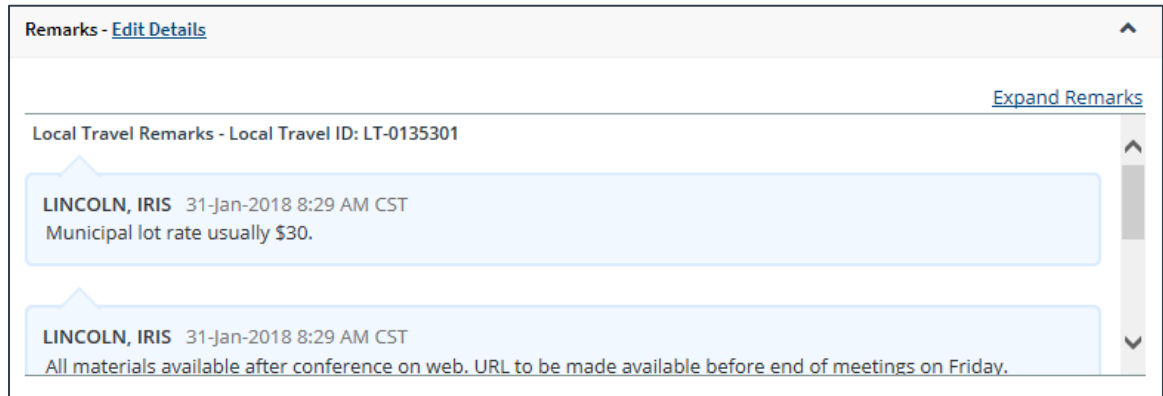


Figure 20: Local Travel Claim Summary — Remarks section

7.2 Attach Supporting Documentation

Like remarks, you can attach receipts or other documents to specific expenses or to the overall local travel claim. If your receipts or documents cover multiple expenses, you may prefer to attach them to the actual claim. Complete the following steps.

- Click the **Attachments** link in the Other Actions section. This displays the Local Travel Attachments window. The maximum file size and allowed file type information display below the **Add Attachment** link.

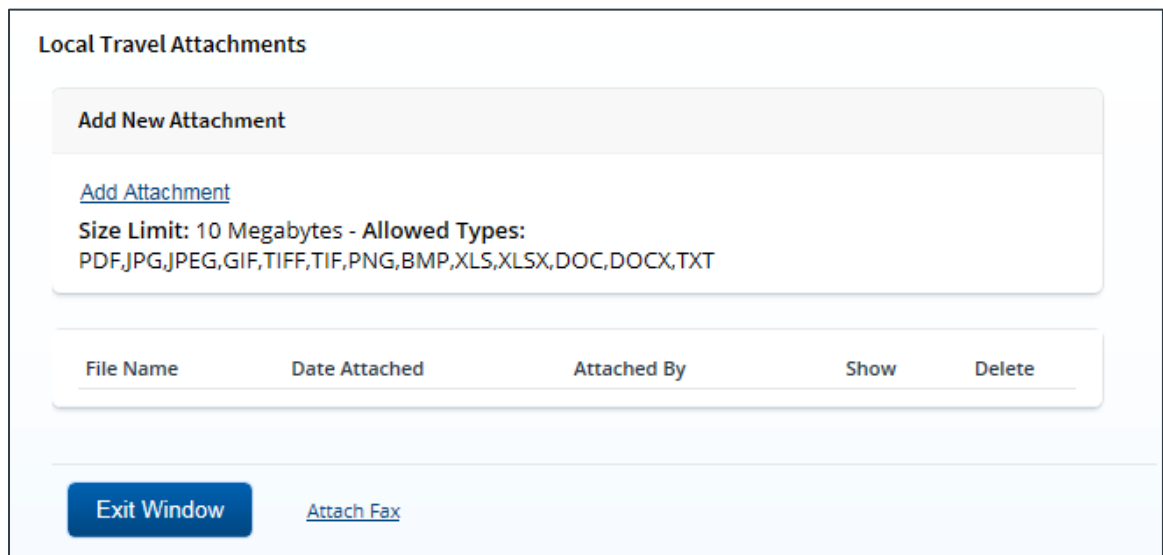


Figure 21: Local Travel Attachments window

- Click the **Add Attachment** link. This displays the system Choose File window.
- Select the PDF file you want to attach to the claim.

- Click **Open**. You are returned to the Local Travel Attachments window. A success message displays when the document is attached, and the new document appears in the list.

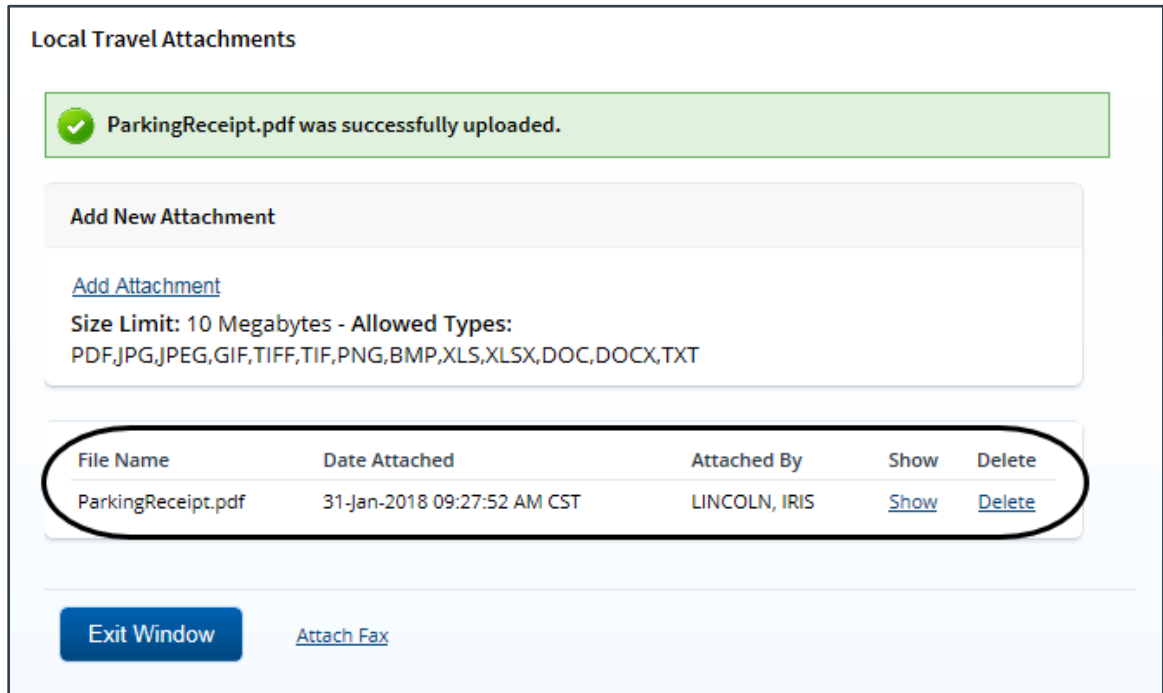


Figure 22: Local Travel Attachments — Attached Document

- Click the **Show** link to view the document.

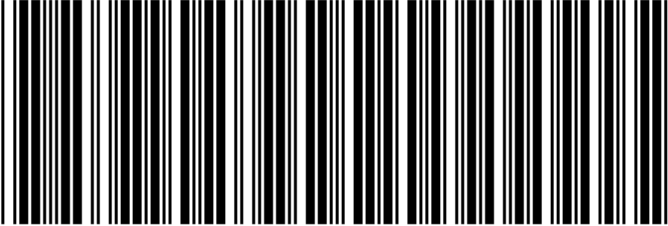
TIP: If this is not the document you want attached to the local travel claim, click **Delete** to remove the file. You are able to delete attached files at any time prior to final approval, as long as you have edit privileges for the document. Adding and deleting receipts will add entries to the Claim History file.

- Click **Exit Window**.

7.2.1 Attaching a Document via Fax

If you have paper documents, you can attach them to the local travel claim via fax, if that capability is available to you. Complete the following steps.

- Click the **Attachments** link in the Other Actions section. This displays the [Local Travel Attachments window](#).
- Click the **Attach Fax** link, which opens the Fax Attachment(s) section in the window.
- Click the **Print the Fax Cover Page** link. This displays a printable version of the cover sheet. The fax cover page includes a special bar code that associates the fax with the local travel claim and includes the phone number to use; the fax cover page must be the first page of your fax.



T-LT-0051229

This cover sheet must be the first page faxed with the bar code at the top of the page.

Never include private or sensitive information, such as social security, credit card or bank account number in fax.

Include this cover sheet with the receipts and fax to:

E2 TRAVEL DOCUMENT/EXPENSE REPORTING

Traveler name: CARLOS GARCIA

Trip Id #: LT-0051229

Standard Document #:

Date Submitted: 20-Jan-2022

Number of pages attached: _____ (including cover page)

Figure 23: Fax cover page

4. Click **Print This Page**.
5. Fax the cover page, along with the documents you want to attach to the local travel claim, to the number shown on your fax cover page. The fax will automatically be added to the list of attached documents within 30 minutes of receipt.

NOTE: Adding an attachment via fax will add an entry to the Claim History file.

7.2.2 View Documents Attached to the Claim


The Receipts and Attachments section of the Local Travel Summary page shows all previously attached documents and faxes. Locate the document in the list, and then click the **Show** link to view the attachment.

Receipts and Attachments - Edit Details			
Local Travel Attachments - Local Travel ID: LT-0135301			
Uploaded By	Date Submitted	File Name	Show
LINCOLN, IRIS	31-Jan-2018 9:27:52 AM CST	ParkingReceipt.pdf	Show

Figure 24: Local Travel Summary — Receipts and Attachments section

7.3 Print the Claim

Complete the following steps to review the printable version of the local travel claim.

1. Click the **Printable Local Voucher** link in the Other Actions section. The local travel claim appears as a PDF file in a new browser window.
2. Click the **Print** icon () to print the document.

TIP: Under certain circumstances, the claim may appear as an HTML file with a **Print** button. If this occurs, click **Print** to print the local travel claim.

E2 Local Travel Voucher

Thu Jan 20 08:49:21 CST 2022

PRIVACY ACT NOTICE: The following information is provided to comply with the Privacy Act of 1974(P.S. 93-579). The information requested on the form is required under the provisions of 5 U.S.C. Chapter 57(as amended), Executive Orders 11609 of July 22, 1971, and 1102 of March 27, 1962, for the purpose of facilitating authorization action and the request for advance of funds for travel and other expenses to be incurred under administrative. The information contained in this form will be used by the Federal agency officers and employees who have a need for such information in the performance of their duties. Information will be transferred to appropriate Federal, State, local, or foreign agencies when relevant to civil, criminal or regulatory investigations, or prosecutions. Failure to provide the information required will result in delay or suspension of the processing of this form.

Voucher Information

Document Number	Trip Status	Trip Id	Submit Date	Approve Date
(System Assigned)	Open Voucher	LT-0051229		2022-01-20
Traveler	Official Duty Station	Title	Final Voucher Flag	
CARLOS GARCIA	Washington, DC		Yes	
Mailing Address		Office Phone	Home Phone	
1060 W. Addison St. Chicago, IL 60613 US		2175558525	N/A	
CONUS/OCONUS	Travel Purpose	Agency Travel	Travel Charge Card Holder	
CONUS	Local meetings	LOC	Yes	
Estimated Dates of Travel				
2022-01-03 thru 2022-01-07				

Voucher Expense Totals

Transport	Lodging	Meals & Incidentals	Car Rental	Local Transport	POV	Misc	Grand Total
0.00	0.00	0.00	0.00	17.00	0.00	38.18	55.18

Voucher Accounting Information

Accounting String	Object Code	CBA Amount	Travel Charge Card	Traveler Amount	Voucher Amount
Segment Names:		0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00

Page 1 of 3

Figure 25: Printable Local Travel Claim

7.4 View Claim History

Click the **View Claim History** link in the Other Actions section to display the Trip History page. This page allows you to view a chronological event log for the claim, showing you not only a description of the event that occurred, but also the name of the person associated with the event. Claim history includes:

- Date and time the claim was created
- Names of users who made changes to the claim
- Date and time the claim was approved
- Claim approver's E2 user name

Trip History ⓘ

Traveler Name: CARLOS GARCIA Local Claim ID: LT-0051229 Voucher Type: Claim Claim Status: Pending Voucher Approval

Document History

- 20Jan22 Thu 07:37AM - Current status Open Voucher
- 20Jan22 Thu 07:37AM - Created by CARLOS GARCIA
- 20Jan22 Thu 07:37AM - Created for Minor Customer:Base National Capital Region Minor Customer 2 (CG02)
- 20Jan22 Thu 08:52AM - Current status: Pending Voucher Approval
- 20Jan22 Thu 08:52AM - Local Voucher LT-0051229 Submitted to FUNDS APPROVER Approver by GARCIA, CARLOS

Departure dates and times are shown in local time for departure location. Expiration dates and times are shown in Central Time.

Figure 26: Trip History — Local Travel Claim

7.5 View the Approval Path

When a local travel claim has been submitted for approval, the status of the document changes to *Pending Voucher Approval*. Click the **View Routing Path** link in the Other Actions section to display the View Routing Path page, which allows you to view the approval path for the claim and, if allowed, make minor changes.

The View Routing Path page lists all of the steps in the approval path for the local travel claim, and includes the following information:

- **Step** – The number of the step in the path.
- **Approver Pool** – The name of the approver group assigned to the step. The person who approves your claim is a member of this approver group.
- **Approval Reason** – The rule that triggered the approval step.
- **Action** – The action to be taken. Some steps are informational only, while others require an approval.
- **Reserved By** – The name of the approver who is currently responsible for completing this step.

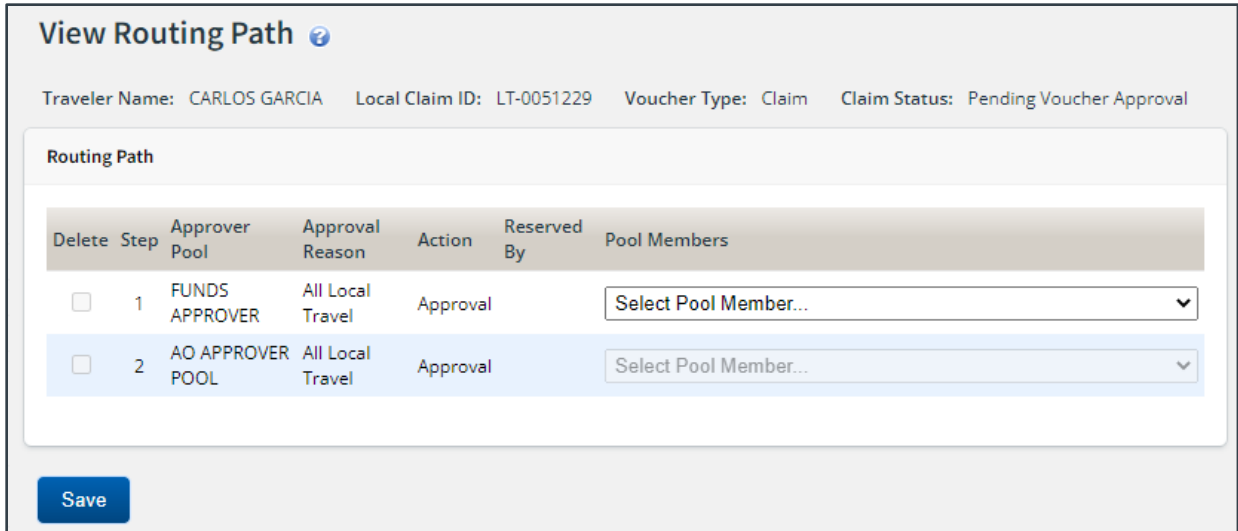


Figure 27: View Routing Path — Local Travel Claim

7.5.1 Change the Approver

If the approver responsible for the current step in the claim’s approval process is unavailable, you can select a new approver for the local travel claim from the **Pool Members** drop-down list. This list displays the name and email address for each approver in the routing pool.

Be sure to click the **Save** button when you are finished to save your selection.

7.6 View Routing History

Click the **View Routing History** link in the Other Actions section to display the View Routing History page. This page provides a chronological log of approval events associated with the local travel claim, including the date and time of the event, action that triggered the event, and the event details.

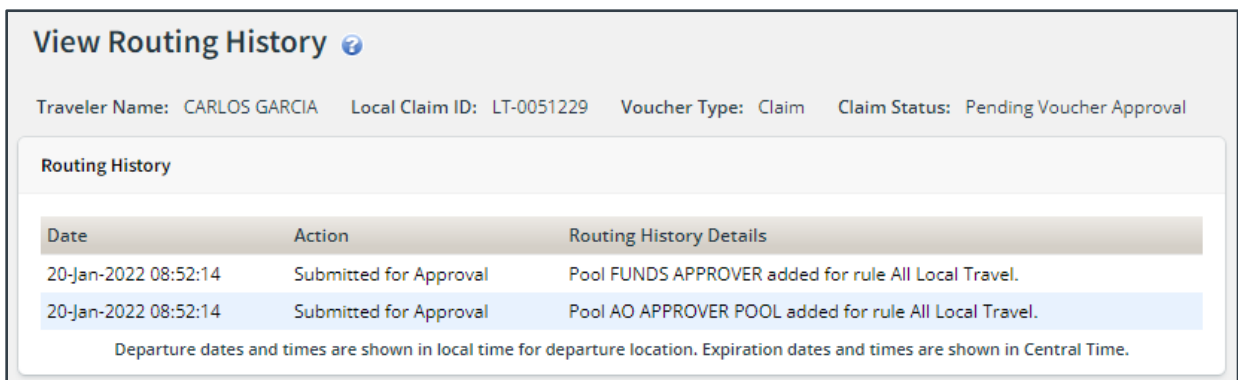


Figure 28: View Routing History — Local Travel Claim

7.7 View Payments

If the local travel claim has a status of *Awaiting Payment* or *Closed*, you can view a history of payment information for the claim. Click the **View Payments** link in the Other Actions section to display the View Payments page. This page shows payment information associated with the claim, including the amount due, date and amount paid, and the entity that received the payment.

View Payments

Traveler Name: CARLOS GARCIA Local Claim ID: LT-0051229 Voucher Type: Claim Claim Status: Closed Voucher

Payment Information

Document Number	Payment Type	Paid To	Amount Due	Due Date	Amount Paid	Paid Date
70Z0LOC22000303	Local Travel	Travel Charge Card	6.90	20-Jan-2022	6.90	20-Jan-2022
70Z0LOC22000303	Local Travel	Traveler	48.28	20-Jan-2022	48.28	20-Jan-2022

Figure 29: View Payments — Local Travel Claim

8 Correcting Problems on the Claim

When the claim is submitted for approval, the claim's status changes to *Pending Voucher Approval*. If the approver encounters a problem with the claim, such as an expense that requires additional justification, the claim is returned to you for revision and the claim's status changes to *Voucher Revised*. Approvers must indicate why the claim is being returned, and often enter helpful remarks so you can make the appropriate corrections and resubmit the claim for approval.

Claim ID	Start Date	End Date	Purpose	Status	Approver	Show	Copy Trip	Archive
LT-0135302	01-Feb-2018	03-Mar-2018	Local Site Visits	Open Voucher		Show	Copy	
LT-0135301	01-Jan-2018	05-Jan-2018	Local Site Visits	Voucher Revised		Show	Copy	

Figure 30: My E2 Local Travel — Voucher Revised status

Complete the following steps to see the reason the claim was returned and to correct the problem.

1. Open the local travel claim. A warning message on the claim's Summary page shows the reason selected by the approver when returning the claim for revision.

Figure 31: Local Travel Summary — Revision Reason

2. Review the Remarks section on the Summary page to see if the approver entered comments to help you correct the claim.

TIP: Click **View Claim History** in *Other Actions* to see who returned the claim to you.

3. Make the necessary corrections to the claim.
4. Click **Send to Approver** on the Summary page to resubmit the claim for approval.

9 Copying an Existing Claim

If you submit similar claims on a regular basis, you may prefer to use the Copy function to create a new claim from an existing claim. This feature allows you to provide a new starting date for your claim, and then E2 automatically updates the new claim with the same expenses and other information from the existing claim.

9.1 Rules

The following rules apply to the Copy feature:

- The ending date is determined by adding the number of days covered by the original claim to the starting date for your new claim.
- Expense dates are based on the starting date of the new claim. If, for example, an expense was claimed on the third day of the original claim, it will be claimed on the third day of the new claim.
- Funding data, remarks, receipts, and attachments are not copied to the new claim.
- You can edit the new claim to make the necessary changes or you can delete the claim, if needed. There is no difference between a claim created by copying an existing claim and a claim created using the process described in this user guide.

9.2 Process Flow

Complete the following steps to create a new claim by copying an existing claim.

1. Locate the claim on the My E2 **Local Travel** tab.



Figure 32: My E2 Local Travel — Copy link

2. Click the **Copy** link. This displays the Copy Trip page.

The screenshot shows the 'Copy Trip: LT-0135301' form. The title is 'Copy Trip: LT-0135301'. Below the title is a section for 'Copy Trip Information'. The first field is 'New Trip Start Date:*' with a text input box and a calendar icon. Below the input box is a note '*Required'. At the bottom of the form are two buttons: 'Copy' and 'Cancel'.

Figure 33: Copy Trip — Local Travel Claim

3. Enter the starting date for the new claim in the **New Trip Start Date** field, or click the calendar icon to select the date from the drop-down calendar.
4. Click **Copy**. E2 creates the new local travel claim and that claim's Summary page displays. A message indicates the new claim was successfully created by copying the existing claim.

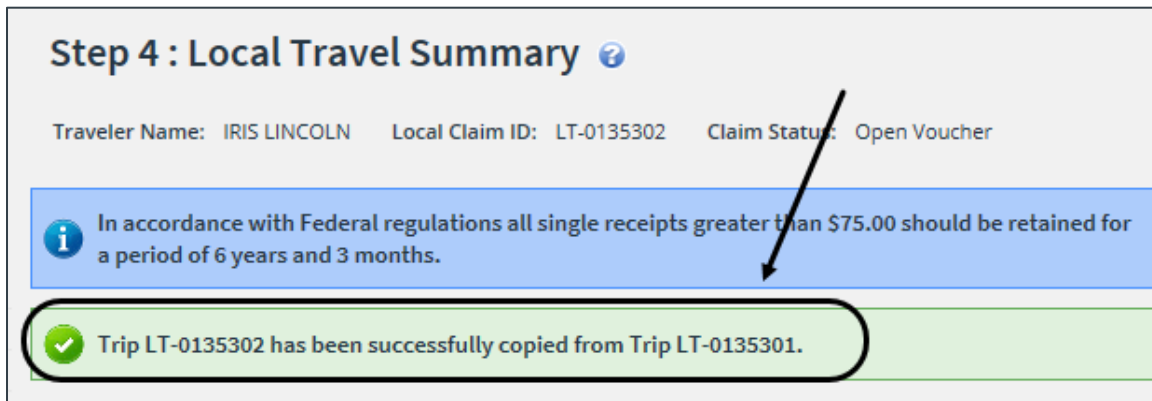


Figure 34: Local Travel Summary — Claim Successfully Copied message

10 Deleting a Local Travel Claim

At certain points in the claim process, you can delete a claim that has not yet been submitted for approval. Click the **Delete Claim** link in the Extras section to delete the claim. When the Confirm Action window displays, click **Confirm**. The claim is deleted and you are returned to the My E2 **Local Travel** tab.

- If the **Delete Claim** link is unavailable, the claim cannot be deleted. The link does not appear in the Extras section until you have completed the Local Travel Basic Information page, and it is not available after you have submitted the claim for approval and payment.
- If you need to delete the claim but have already submitted it for approval, contact the approver and request the claim be returned to you. Refer to the [View the Approval Path](#) section for more information on locating the approver.

11 Recalling a Local Travel Claim from the Approval Process

If you need to change a claim after you submit it for approval, but before it completes the approval process, you can recall the document. Recalling a document removes it from the approval process and changes the document's status from *Pending Approval* to *Revised*. (You can recall a claim that is pending approval at any time until it receives final approval.) You can make your changes and then resubmit the claim for approval.

Complete the following steps.

1. Locate the claim on the My E2 **Local Travel** tab.
2. Click the **Show** link. This displays the claim's Summary page.

Step 4 : Local Travel Summary ⓘ

Traveler Name: IRIS LINCOLN Local Claim ID: LT-0135301 Claim Status: Pending Voucher Approval

i In accordance with Federal regulations all single receipts greater than \$75.00 should be retained for a period of 6 years and 3 months.

[collapse](#) or [expand](#) all sections

Basic Information - [View Details](#) ▼

Expenses - [View Details](#) ▼

Accounting - [View Details](#) ▼

Remarks - ▼

Receipts and Attachments - [Edit Details](#) ▼

Recall [Back to Step 3: Accounting](#)

Figure 35: Local Travel Summary — Recall button

3. Click **Recall**. This displays the Confirm Action window.
4. Click **Confirm**. The claim is returned to you, the status changes to *Voucher Revised*, and you can make your changes. Resubmit the claim for approval when you are finished.

12 Tips for Arrangers

As an arranger, you can create a local travel claim for a traveler. After completing the claim, you do not send it to an approver, but to the traveler for an initial review. The traveler can then make changes, if necessary, and submit the claim for approval.

12.1 Arranger Session

Before you begin, you must start an arranger session for the traveler. Click **Travel for Others** on the task bar, and then click the **Arrange** link for the appropriate traveler. When you are in an arranger session, the task bar only includes three options – **Traveler's Trips**, **Traveler's Profile**, and **Traveler's Dependents** – and the label on the User Options menu identifies you as well as the traveler for whom you are arranging travel (i.e., *Traveler's Name // Your Name*).

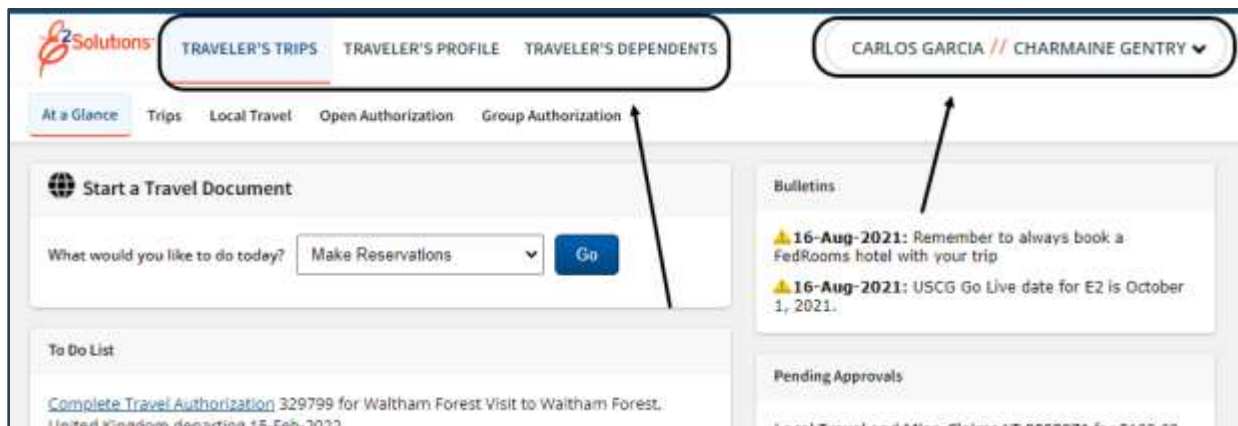


Figure 36: My E2 At a Glance — Arranger Session

12.2 Arranger Differences

Create the local travel claim for the traveler following the procedures outlined in this user guide. You may notice a few differences:

- The primary action button on the Local Travel Summary page is **Send to Traveler**. When you arrange local travel for another person, that person becomes the first "approver" in the routing path, and is responsible for submitting the claim for approval, with or without modifications.
- You can [recall a document](#) that you have sent to a traveler for review. When the status of the claim is *Pending Voucher Approval (Traveler Review)*, the **Recall** button appears at the bottom of the Local Travel Summary page. Recalling the claim removes it from the approval process. You can make changes and the resubmit it to the traveler for review.

13 Performing a Traveler Review

When an arranger creates and submits a local travel claim on your behalf, that claim does not immediately enter the normal approval routing path. Instead, it is sent to you for review and official submittal.

E2 sends an email to you when an arranger submits a claim on your behalf. The claim appears on the My E2 **Local Travel** tab with a *Pending* icon in the Claim column, and a notification appears on the My Approvals **Pending Approvals** tab.

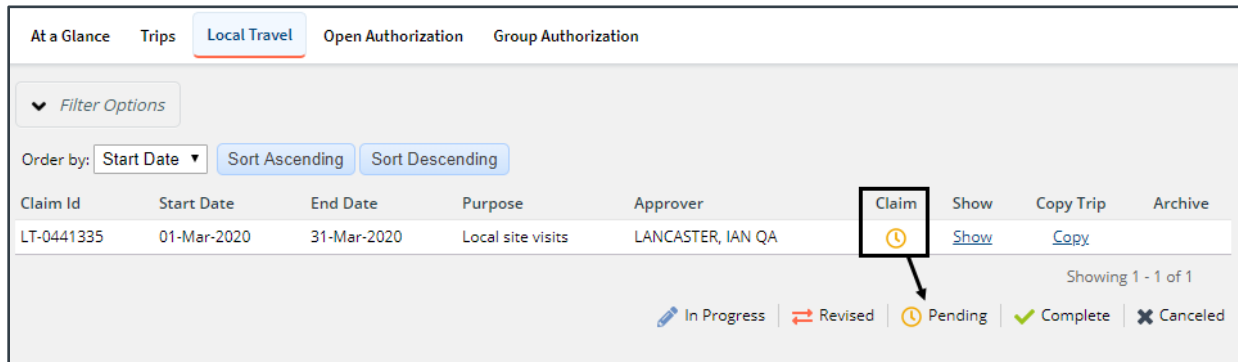


Figure 37: My E2 Local Travel — Claim Pending Voucher Approval

Complete the following steps.

1. Locate the claim and click the **Show** link. This displays the claim's Summary page.
 - Find the claim in the list on the My E2 **Local Travel** tab, and then click **Show**.
 - Click **My Approvals**, find the claim in the list on the Pending Approvals page, and then click **Show**.
2. Review the claim details. Depending on your group's travel policies, you may be able to add a document number to the claim or make funding changes before submitting it for approval.
 - Use the **collapse** and **expand** links, as well as the individual collapse/expand indicators for each section, to collapse and expand sections and help you focus on the information you want to review.
 - Click the **View Details** or **Edit Details** link in each section, as needed, to see additional information.
3. Click **Approve** when you are finished. This action sends the local travel claim into the normal approval process, and a Confirm Action window displays.
4. Read the acceptance policy listed in the Confirm Action window. Your acceptance of any policy statements is logged in document history.
5. Click **Confirm**.

13.1 Modifying the Local Travel Claim

If you need to make changes to a local travel claim that is pending your review, click the **Modify Claim** button at the bottom of the Summary page. You are returned to the Basic Information page, where a message indicates the claim has been removed from a *Pending Approval* status and is now available for modification.

Follow the normal local travel claim workflow steps as outlined in this user guide to make changes, and then resubmit the claim for approval.

14 Revision History

Date	Description	Release
01/2022	Document creation	22.1

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