

**Exercise #3b: Adjustment to a Travel Authorization/Allocate ACCS**

- Objectives:**
- Adjust a Travel Authorization
  - Allocate ACCS

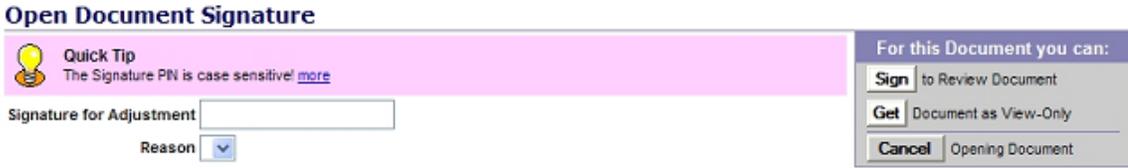
**Notes:** *Adjustments are done to travel authorizations prior to the document having a DATALINK status.*

*After the authorization has been stamped with a status (SIGNED, REVIEWED, etc) to adjust a document, the person making the change, will need to use their Signature PIN to sign in the document to edit it. The person making the changes will then need to re-stamp the authorization SIGNED to get the authorization through the electronic routing for approval.*

*ACCS allocation is done when the document has more than one accounting code. This process allows the preparer to split costs between the accounting codes associated with the document.*

**Instructions:** Execute the following steps:

After the TA has been stamped SIGNED, you find out that there are more accounting codes that are going to share in the costs of the travel. Your Approving Official has not stamped the document APPROVED yet, so you are still able to make an adjustment.

Step	Action
1	<p>From the <b>Home</b> screen click on the <b>Open Document</b>  icon which will take you to the <b>Open Document Signature</b> screen.</p>  <p>➤ Enter your <b>Signature PIN</b></p> <p>➤ Click the <b>Sign</b> (to Review Document) button</p>

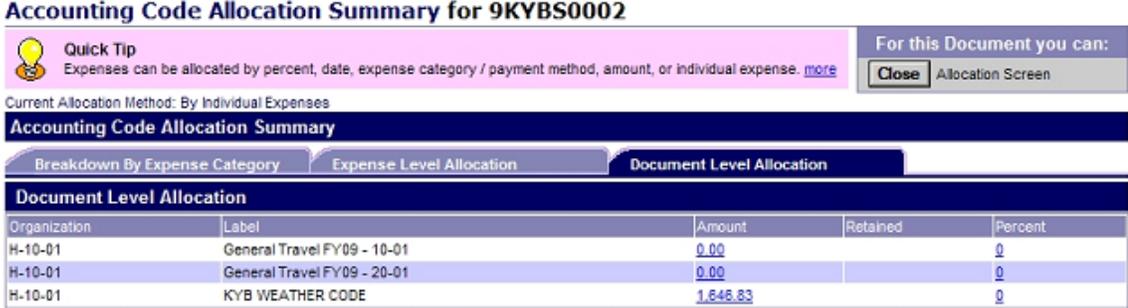
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<p>2</p>	<p>The <i>Document Summary</i> screen appears.</p> <p>➤ Click <b>Accounting</b> in the <i>Document Toolbar</i> to open up the <i>Available Accounting Code</i> screen.</p> <div data-bbox="289 464 1417 968" style="border: 1px solid black; padding: 5px;"> <p><b>Available Accounting Code for 9KYBS0002</b></p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p><b>Quick Tip</b> To select an account code, click the label link. To search by label, type some of the label in the field and click the Search button. To retrieve all account codes with the same label from all orgs, type the entire label and click the Retrieve button. <a href="#">more</a></p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>For this Document you can:</p> <p><b>Add</b> New Accounting Code</p> <p><b>Back</b> <b>Continue</b></p> </div> </div> <div style="background-color: #003366; color: white; padding: 5px; margin-top: 5px;"> <p><b>Enter Search Criteria</b></p> <p>Accounting Code <input type="text"/> <b>Search</b> <b>Retrieve</b></p> </div> <div style="background-color: #003366; color: white; padding: 5px; margin-top: 5px;"> <p><b>Master Accounting Code</b> <span style="float: right;">Click Accounting Code Label to add to Document</span></p> <p>Search Results <span style="float: right;"><a href="#">Prev 20</a> <a href="#">Next 20</a></span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Organization</th> <th>Label</th> <th>Classification Code</th> </tr> </thead> <tbody> <tr> <td>H-10-01</td> <td><a href="#">38R1B2310</a></td> <td>2010- 14- 38R1B23- 10010000- 00000000- ----</td> </tr> <tr> <td>H-10-01</td> <td><a href="#">Coastal09</a></td> <td>2009- 14- 18K3B01- 10010000- 00000000- ----</td> </tr> <tr> <td>H-10-01</td> <td><a href="#">Coastal10</a></td> <td>2010- 14- 18K3B01- 10010000- 00000000- ----</td> </tr> <tr> <td>H-10-01</td> <td><a href="#">General Travel FY09</a></td> <td>2009- 14- GTRNTRVP00- 06510000- 00000000- ----</td> </tr> </tbody> </table> </div> <div style="background-color: #003366; color: white; padding: 5px; margin-top: 5px;"> <p><b>Accounting Code for 9KYBS0002</b> <span style="float: right;">Click an item to edit/delete it</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Organization</th> <th>Label</th> <th>Default</th> <th>Classification Code</th> <th>Extended Code</th> </tr> </thead> <tbody> <tr> <td>  H-10-01</td> <td>KYB WEATHER CODE</td> <td><input checked="" type="radio"/></td> <td>2009- 14- GTRNTRVP00- 06020000- 00000000- ----</td> <td><a href="#">Extended</a></td> </tr> </tbody> </table> </div> </div>	Organization	Label	Classification Code	H-10-01	<a href="#">38R1B2310</a>	2010- 14- 38R1B23- 10010000- 00000000- ----	H-10-01	<a href="#">Coastal09</a>	2009- 14- 18K3B01- 10010000- 00000000- ----	H-10-01	<a href="#">Coastal10</a>	2010- 14- 18K3B01- 10010000- 00000000- ----	H-10-01	<a href="#">General Travel FY09</a>	2009- 14- GTRNTRVP00- 06510000- 00000000- ----	Organization	Label	Default	Classification Code	Extended Code	H-10-01	KYB WEATHER CODE	<input checked="" type="radio"/>	2009- 14- GTRNTRVP00- 06020000- 00000000- ----	<a href="#">Extended</a>
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5	<p>On the <b>Breakdown by Expense Category</b> tab, which the screen defaults to, a preparer has the ability to allocate costs by a category amount. By clicking on one of the amount listed the <i>Allocate by Amount per Expense Category/Payment Method</i> screen.</p> <div data-bbox="298 646 1414 982" style="border: 1px solid black; padding: 5px;"> <p><b>Allocate By Amount per Expense Category / Payment Method for 9KYBS0002</b></p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #fce4ec; padding: 5px; border: 1px solid #ccc;"> <p> <b>Quick Tip</b> For each expense category / payment method, divide the total amount among the selected account labels. Cycle through the expense categories / payment methods using the links below. All entries must balance before saving; cancel at any time without saving. <a href="#">more</a></p> </div> <div style="background-color: #546e7a; color: white; padding: 5px; border: 1px solid #ccc;"> <p>For this Document you can:</p> <p><b>Save</b> Amount Changes</p> <p><b>Done</b> Save &amp; Exit Amount Changes</p> <p><b>Cancel</b> Amount Changes</p> </div> </div> <p style="text-align: center;">Expense Category: OTHER TRAVEL Payment Method: OTHER Total Amount: 30.00</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Organization</th> <th style="width: 40%;">Label</th> <th style="width: 40%;">Amount</th> </tr> </thead> <tbody> <tr> <td>H-10-01</td> <td>General Travel FY09 - 10-01</td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td>H-10-01</td> <td>General Travel FY09 - 20-01</td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td>H-10-01</td> <td>KYB WEATHER CODE</td> <td><input type="text" value="30.00"/></td> </tr> <tr> <td></td> <td>*Unallocated Amount</td> <td><input type="text"/></td> </tr> </tbody> </table>   <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #002060; color: white;"> <th colspan="4">Breakdown by Expense Category / Payment Method</th> </tr> <tr style="background-color: #546e7a; color: white;"> <th>Expense Category</th> <th>Payment Method</th> <th>Sponsor Type</th> <th>Amount Allocated</th> </tr> </thead> <tbody> <tr><td>COM. CARRIER</td><td>AGENCY CARD</td><td></td><td style="text-align: right;">253.00</td></tr> <tr><td>LODGING TAX</td><td>GOVCC</td><td></td><td style="text-align: right;">50.00</td></tr> <tr><td>Lodging-PerDiem</td><td>GOVCC</td><td></td><td style="text-align: right;">531.00</td></tr> <tr><td>M&amp;E-PerDiem</td><td>OTHER</td><td></td><td style="text-align: right;">224.00</td></tr> <tr><td>MILEAGE</td><td>OTHER</td><td></td><td style="text-align: right;">170.82</td></tr> <tr><td>OTHER TRAVEL</td><td>OTHER</td><td></td><td style="text-align: right;">30.00</td></tr> <tr><td>RENTAL CAR</td><td>GOVCC</td><td></td><td style="text-align: right;">300.00</td></tr> <tr><td>TRANSACTION FEES</td><td>AGENCY CARD</td><td></td><td style="text-align: right;">23.01</td></tr> <tr><td>TRANSPORT</td><td>OTHER</td><td></td><td style="text-align: right;">65.00</td></tr> </tbody> </table> </div> <p>A preparer is then able to enter specific amounts for each of the ACCS listed. The total amount is listed toward the top of the screen and there is a field for an unallocated amount. The goal is to split the money so that the unallocated amount shows nothing and the ACCS amounts equal the total amount.</p> <p>To save the changes but remain on this screen in order to allocate another amount, click <b>SAVE</b>.</p> <p>To save the changes but return to the <i>Allocation Summary</i> screen, click <b>DONE</b>.</p>	Organization	Label	Amount	H-10-01	General Travel FY09 - 10-01	<input type="text" value="0.00"/>	H-10-01	General Travel FY09 - 20-01	<input type="text" value="0.00"/>	H-10-01	KYB WEATHER CODE	<input type="text" value="30.00"/>		*Unallocated Amount	<input type="text"/>	Breakdown by Expense Category / Payment Method				Expense Category	Payment Method	Sponsor Type	Amount Allocated	COM. CARRIER	AGENCY CARD		253.00	LODGING TAX	GOVCC		50.00	Lodging-PerDiem	GOVCC		531.00	M&E-PerDiem	OTHER		224.00	MILEAGE	OTHER		170.82	OTHER TRAVEL	OTHER		30.00	RENTAL CAR	GOVCC		300.00	TRANSACTION FEES	AGENCY CARD		23.01	TRANSPORT	OTHER		65.00
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6a	<p>The preparer has the ability to specify the starting dates for the ACCS to cover. For example, the first ACCS could cover 2 days of the trip, the second 2 days and the third 1 day. At the top of the screen is the earliest expense date and that date has to be in one of the ACCS fields listed.</p> <p><b>Allocate By Date for 9KYBS0002</b></p> <p> <b>Quick Tip</b> Enter a begin date for each account label, or use the calendar icon to select one. The earliest expense date must be entered before the selections can be saved; cancel at any time without saving. <a href="#">more</a></p> <p>For this Document you can: <b>Save</b> Date Changes <b>Cancel</b> Date Changes</p> <p>Earliest Expense Date: 08/03/09</p> <table border="1"> <thead> <tr> <th>Organization</th> <th>Label</th> <th>Begin Date</th> </tr> </thead> <tbody> <tr> <td>H-10-01</td> <td>General Travel FY09 - 10-01</td> <td><input type="text"/> </td> </tr> <tr> <td>H-10-01</td> <td>General Travel FY09 - 20-01</td> <td><input type="text"/> </td> </tr> <tr> <td>H-10-01</td> <td>KYB WEATHER CODE</td> <td><input type="text"/> </td> </tr> </tbody> </table> <p><b>Note:</b> If allocating by date, all expenses listed in the Expenses screen should be broken out for when the expense is to occur. This way the expenses will be distributed more equally.</p>	Organization	Label	Begin Date	H-10-01	General Travel FY09 - 10-01	<input type="text"/>	H-10-01	General Travel FY09 - 20-01	<input type="text"/>	H-10-01	KYB WEATHER CODE	<input type="text"/>								
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6c	<p>The preparer has the ability to select an ACCS based of the expense description. The expenses are listed by date and the description – much like you would view on the Expenses screen. Using the drop-down listing, the preparer can choose which ACCS should belong to that expense.</p> <div data-bbox="293 1123 1425 1732"> <p><b>Allocate By Expense for 9KYBS0002</b></p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="293 1159 1036 1228"> <p><b>Quick Tip</b> From the drop down list, select the appropriate account label for each listed expense. 'Save' each set of expenses before navigating to the next group. Select 'Done' to save your final changes and return to the master allocation screen. Cancel only undoes changes for the current screen. <a href="#">more</a></p> </div> <div data-bbox="1047 1159 1287 1266"> <p>For this Document you can:  <input type="button" value="Save"/> Expense Allocations  <input type="button" value="Done"/> Save &amp; Exit Allocations  <input type="button" value="Cancel"/> Expense Allocations</p> </div> </div> <table border="1" data-bbox="293 1276 1287 1732"> <thead> <tr> <th colspan="6">Expenses on Current Document</th> </tr> <tr> <th>Date</th> <th>Description</th> <th>Pay Method</th> <th>Sponsor Type</th> <th>Amount</th> <th>Organization/Label</th> </tr> </thead> <tbody> <tr> <td>08/03/09</td> <td>1POC-Private Vhcle</td> <td>OTHER</td> <td></td> <td>170.82</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/03/09</td> <td>Airline Flight</td> <td>AGENCY CARD</td> <td></td> <td>253.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/03/09</td> <td>Gas-Rental/Govt Car</td> <td>OTHER</td> <td></td> <td>65.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/03/09</td> <td>Hotel Tax</td> <td>GOVCC</td> <td></td> <td>50.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/03/09</td> <td>Lodging</td> <td>GOVCC</td> <td></td> <td>177.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/03/09</td> <td>M&amp;IE</td> <td>OTHER</td> <td></td> <td>48.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/03/09</td> <td>Parking Fees</td> <td>OTHER</td> <td></td> <td>30.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/03/09</td> <td>Rental Car</td> <td>GOVCC</td> <td></td> <td>300.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/03/09</td> <td>TMC Transaction Fees</td> <td>AGENCY CARD</td> <td></td> <td>23.01</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/04/09</td> <td>Lodging</td> <td>GOVCC</td> <td></td> <td>177.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/04/09</td> <td>M&amp;IE</td> <td>OTHER</td> <td></td> <td>64.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> <tr> <td>08/05/09</td> <td>Lodging</td> <td>GOVCC</td> <td></td> <td>177.00</td> <td>H-10-01/KYB WEATHER CODE</td> </tr> </tbody> </table> </div>	Expenses on Current Document						Date	Description	Pay Method	Sponsor Type	Amount	Organization/Label	08/03/09	1POC-Private Vhcle	OTHER		170.82	H-10-01/KYB WEATHER CODE	08/03/09	Airline Flight	AGENCY CARD		253.00	H-10-01/KYB WEATHER CODE	08/03/09	Gas-Rental/Govt Car	OTHER		65.00	H-10-01/KYB WEATHER CODE	08/03/09	Hotel Tax	GOVCC		50.00	H-10-01/KYB WEATHER CODE	08/03/09	Lodging	GOVCC		177.00	H-10-01/KYB WEATHER CODE	08/03/09	M&IE	OTHER		48.00	H-10-01/KYB WEATHER CODE	08/03/09	Parking Fees	OTHER		30.00	H-10-01/KYB WEATHER CODE	08/03/09	Rental Car	GOVCC		300.00	H-10-01/KYB WEATHER CODE	08/03/09	TMC Transaction Fees	AGENCY CARD		23.01	H-10-01/KYB WEATHER CODE	08/04/09	Lodging	GOVCC		177.00	H-10-01/KYB WEATHER CODE	08/04/09	M&IE	OTHER		64.00	H-10-01/KYB WEATHER CODE	08/05/09	Lodging	GOVCC		177.00	H-10-01/KYB WEATHER CODE
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7	<p>On the <b>Document Level Allocation</b> tab, the preparer has the abilities to allocate costs by:</p> <ul style="list-style-type: none"> <li>• Amount</li> <li>• Percentage</li> </ul> <p><b>Accounting Code Allocation Summary for 9KYBS0002</b></p> 
7a	<p>The preparer has the ability to take the total amount of the document and split it by the amount each ACCS is going to pay. For example, if the total document amount is \$1,500, an allocation of \$500 for each ACCS can be done. If done this way, the system will take the \$500 and split it among each of the expense categories. No individual calculations need to be done. The system will do it for you.</p> <p><b>Allocate By Amount per Accounting Code for 9KYBS0002</b></p> 

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7b	<p>The preparer has the ability to take and split the costs by a percentage. The percentages have to equal 100%. For example, ACCS#1 could be 50%, ACCS#2 could be 25% and that would mean ACCS #3 would have to be 25% for a full total percentage of 100%. The system will then take the percentages allotted and split the costs equally by the percentage given.</p> <p><b>Allocate By Percent for 9KYBS0002</b></p> <div style="border: 1px solid gray; padding: 5px;"> <p><b>Quick Tip</b> For each Account label, enter the desired percentage. The total for the Account labels must equal 100% before saving; cancel at any time without saving. <a href="#">more</a></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Organization</th> <th>Label</th> <th>Percent</th> </tr> </thead> <tbody> <tr> <td>H-10-01</td> <td>General Travel FY09 - 10-01</td> <td><input type="text" value="0"/></td> </tr> <tr> <td>H-10-01</td> <td>General Travel FY09 - 20-01</td> <td><input type="text" value="0"/></td> </tr> <tr> <td>H-10-01</td> <td>KYB WEATHER CODE</td> <td><input type="text" value="0"/></td> </tr> <tr> <td colspan="2">*Unallocated Percentage</td> <td><input type="text" value="100"/></td> </tr> </tbody> </table> </div> <p style="text-align: right; margin-top: 10px;">For this Document you can:  <input type="button" value="Save"/> Percent Changes  <input type="button" value="Cancel"/> Percent Changes</p>	Organization	Label	Percent	H-10-01	General Travel FY09 - 10-01	<input type="text" value="0"/>	H-10-01	General Travel FY09 - 20-01	<input type="text" value="0"/>	H-10-01	KYB WEATHER CODE	<input type="text" value="0"/>	*Unallocated Percentage		<input type="text" value="100"/>																																																																																																																																																
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7c	<p>For this exercise, allocate by amount and split each amount equally between the different accounting:</p> <ul style="list-style-type: none"> <li>➤ Click <input type="button" value="Save"/> after each amount</li> <li>➤ Click DONE after each amount</li> </ul>																																																																																																																																																															
7d	<p>The <i>Allocation Summary</i> screen appears and now all of the expenses per ACCS have been given costs based off how it was allocated</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 8px;"> <thead> <tr> <th colspan="7">Expense Category Allocation Breakdown for 'General Travel FY09 - 10-01H-10-01' Breakdown by Expense Category</th> </tr> <tr> <th>Expense Category</th> <th>Payment Method</th> <th>Sponsor Type</th> <th>Amount</th> <th>Expense Category</th> <th>Payment Method</th> <th>Sponsor Type</th> <th>Allocate by Amount</th> </tr> </thead> <tbody> <tr> <td>COM. CARRIER</td> <td>AGENCY CARD</td> <td></td> <td>84.33</td> <td>COM. 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8	<ul style="list-style-type: none"> <li>➤ Check the totals</li> <li>➤ Preview the document</li> <li>➤ Do Pre-Audit Results</li> <li>➤ Stamp the document SIGNED</li> </ul> <p><i>Stamping the document SIGNED again, the person who initiated the adjustment, will need to use the drop-down list and selected SIGNED. They will also have the checkbox that should NOT be checked and remarks should be added stating why the change was made.</i></p> <p>The document will then be routed to the first level of the electronic approval process and you will be taken back to the <b>Home</b> screen where a message toward the bottom stating and email has been sent to “email address”.</p>
<p><b>Note:</b> For <u>TRAINING PURPOSES ONLY</u> – the routing/approval/DATALINK process can not be completed in the training environment. To be able to create a voucher from authorization in the training environment, the status must be set to “Complete.”</p>	
9	<p>From the <b>Home</b> screen click on the <b>Open Document</b>  icon which will take you to the <b>Open Document Signature</b> screen.</p> <div data-bbox="289 1199 1419 1367" style="border: 1px solid gray; padding: 5px;"> <p><b>Open Document Signature</b></p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #f0f0f0; padding: 2px;"> <p> <b>Quick Tip</b> The Signature PIN is case sensitive! <a href="#">more</a></p> </div> <div style="border: 1px solid gray; padding: 2px;"> <p><b>For this Document you can:</b></p> <p><b>Sign</b> to Review Document</p> <p><b>Get</b> Document as View-Only</p> <p><b>Cancel</b> Opening Document</p> </div> </div> <p>Signature for Adjustment <input type="text"/></p> <p>Reason <input type="button" value="v"/></p> </div> <p><b>Notes:</b> On this screen a user has the ability to either sign in to edit the document (which includes stamping in the electronic process) or to Get the document to view it only.</p> <p><i>User should not be clicking the SIGN button just to view information, including where the document is in the routing process.</i></p>
9a	<ul style="list-style-type: none"> <li>➤ Enter your <b>Signature PIN</b></li> <li>➤ Click the <b>Sign</b> (to Review Document) button</li> </ul> <p>The <b>Document Summary</b> screen appears.</p> <ul style="list-style-type: none"> <li>➤ Click <b>Document Status</b> in the <b>Document Toolbar</b> to open up the <b>Status</b> screen.</li> </ul>

Step	Action																										
<p>9b</p>	<p><b>Status for 9CRBS0001</b></p> <p> <b>Quick Tip</b> The Signature PIN is case sensitive! <a href="#">more</a></p> <p><b>For this Document you can:</b></p> <p><b>Stamp</b> and Submit Document  <b>Adjustments</b> Go To Adjustments  <b>Back</b> <b>Continue</b></p> <p>Status to Apply: APPROVED <input type="checkbox"/> Stamp Document Without Adjustment</p> <p>Signature PIN: <input type="text"/></p> <p>Reason: <input type="text"/></p> <p>Remarks: <input type="text"/></p> <p><b>Document Routing</b> <span style="float: right;">This is the routing path the current document will take once routed</span></p> <table border="1"> <thead> <tr> <th>Name</th> <th>Status</th> <th>Level</th> </tr> </thead> <tbody> <tr> <td>Donald O. Boulder</td> <td>APPROVED</td> <td>5</td> </tr> </tbody> </table> <p><b>Document History</b> <span style="float: right;">This is the status history for this document</span></p> <table border="1"> <thead> <tr> <th>Date/Time</th> <th>Status</th> <th>Name</th> <th>Remarks</th> <th>Reason Desc</th> </tr> </thead> <tbody> <tr> <td>09/25/09 10:52AM</td> <td>CREATED</td> <td>Pam A. Boulder</td> <td></td> <td></td> </tr> <tr> <td>09/25/09 10:57AM</td> <td>SIGNED</td> <td>Pam A. Boulder</td> <td></td> <td></td> </tr> <tr> <td>09/25/09 11:02AM</td> <td>ADJUSTED</td> <td>Donald O. Boulder</td> <td></td> <td></td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>➤ Change the status to <b>Completed</b></li> <li>➤ Enter your <b>Signature PIN</b></li> <li>➤ Enter your <b>Remarks</b></li> <li>➤ Check the checkbox <b>Stamp Without Adjustment</b></li> <li>➤ Click the <b>Stamp</b> (and Submit Document) button</li> </ul>	Name	Status	Level	Donald O. Boulder	APPROVED	5	Date/Time	Status	Name	Remarks	Reason Desc	09/25/09 10:52AM	CREATED	Pam A. Boulder			09/25/09 10:57AM	SIGNED	Pam A. Boulder			09/25/09 11:02AM	ADJUSTED	Donald O. Boulder		
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<p>9c</p>	<p>The <b>Pre-Audit Results for Document #</b> screen appears.</p> <ul style="list-style-type: none"> <li>➤ Verify the document status is PASS</li> <li>➤ Click the <b>Continue</b> (Stamping the Document) button</li> </ul> <p>You will be taken back to the <b>Home</b> screen.</p> <p><b>Notes:</b> A preparer in <b>PRODUCTION</b> should <b>NOT</b> set any authorization with the status of completed. This step is only for training purposes.</p> <p>A preparer should only open the document up using their Signature PIN is if they are doing an adjustment or amendment. Otherwise the preparer should only use the GET button. That will bring the document up in <b>VIEW ONLY</b> mode.</p>																										