Exercise #2a: Travel Authorization (Editing Traveler Information)

Objectives:
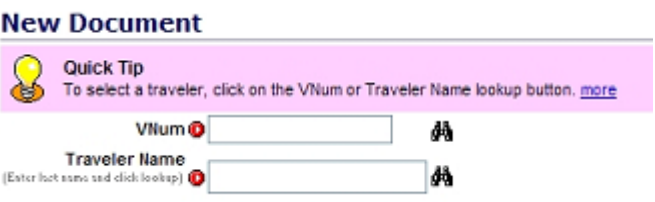- Create a new travel authorization
- Edit traveler information

Notes: *This exercise covers how to create a basic travel authorization to a single location. It also covers editing the traveler information within the document.*
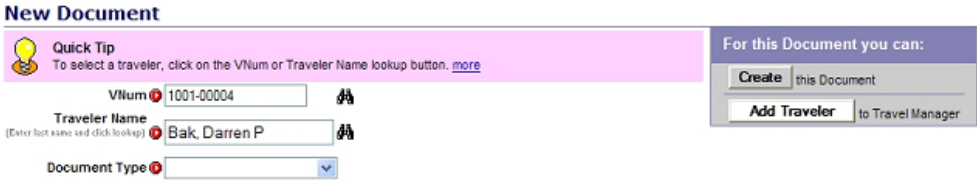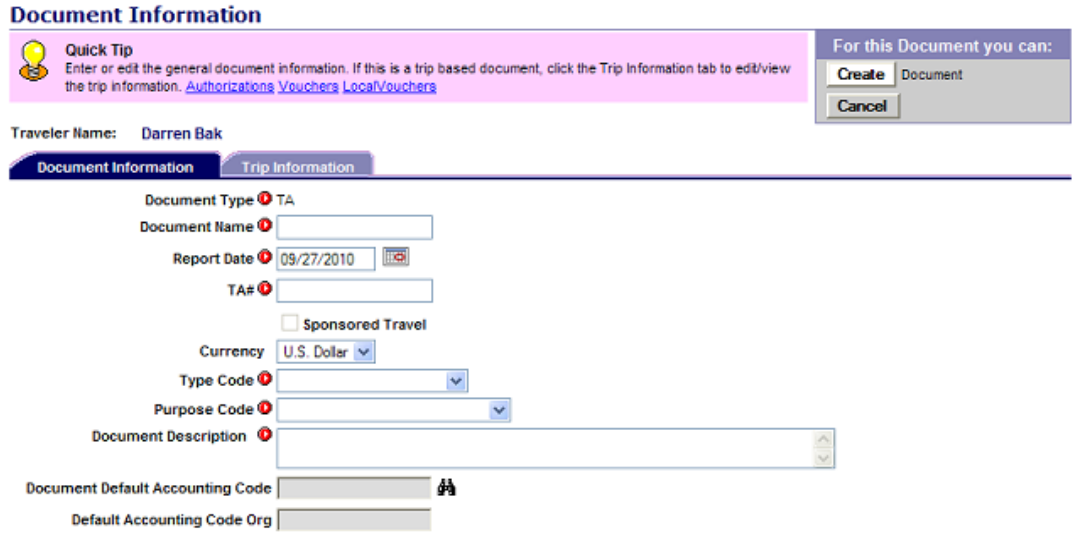
Instructions: Execute the following steps:

You have been instructed to attend a training class in Chicago, IL. The class dates are the June 22nd and 23rd.   You will have travel days on either side of the training. Your POV costs will include a person taking you to the airport and picking you up. Since this is the first authorization you are completing, you will have to enter some basic traveler information. Your authorization will need to include the following costs:
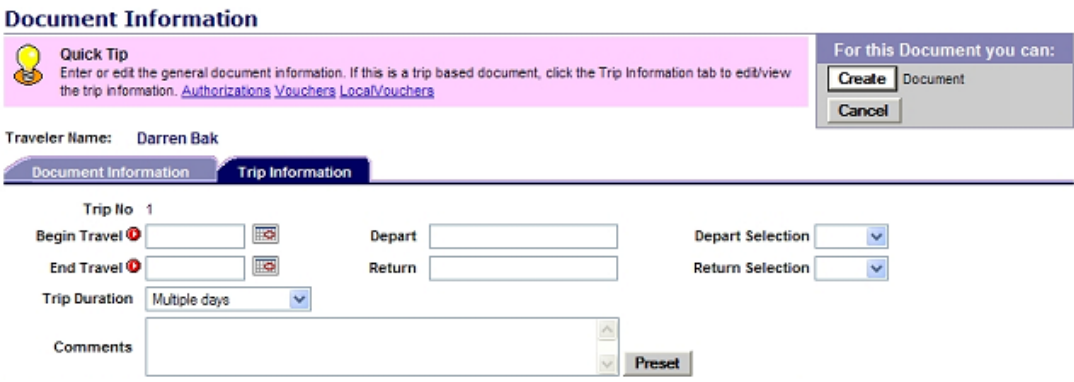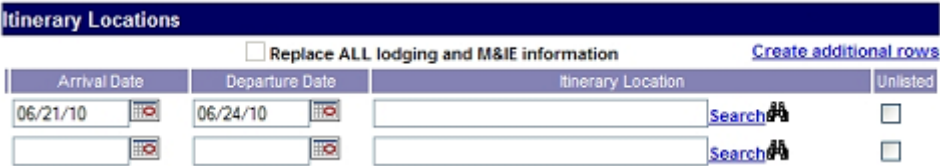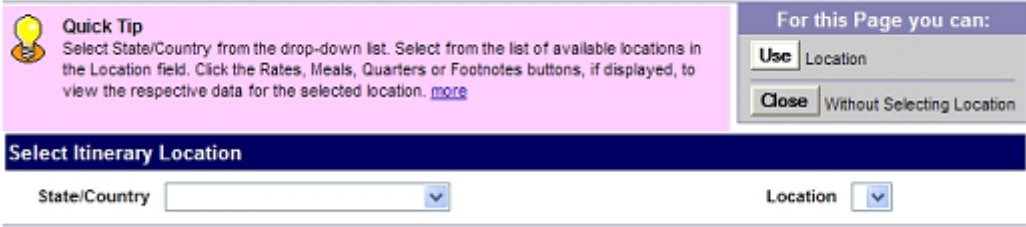
Estimated Expenses
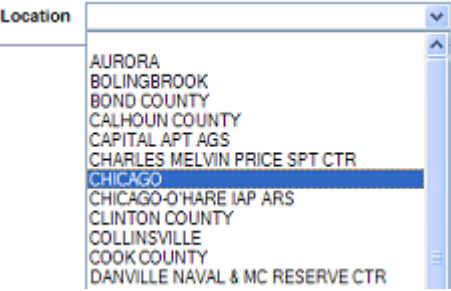$225.00 = Round-trip air fare
$23.79 = Transaction Fee
50 miles one way to airport using private vehicle (POV)
$350 for Rental Car
$65 for Rental Car Gas
$30 for Parking at the hotel
$50 for Hotel Tax

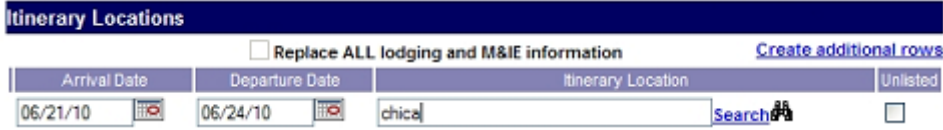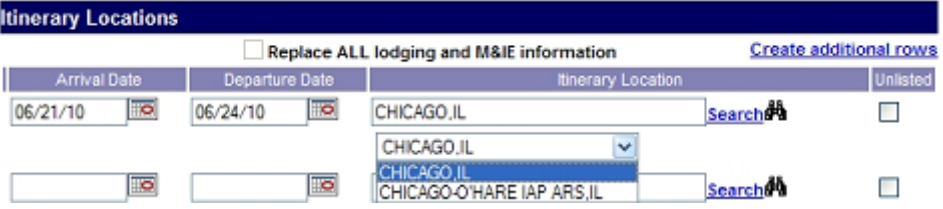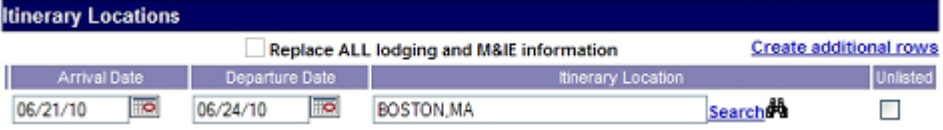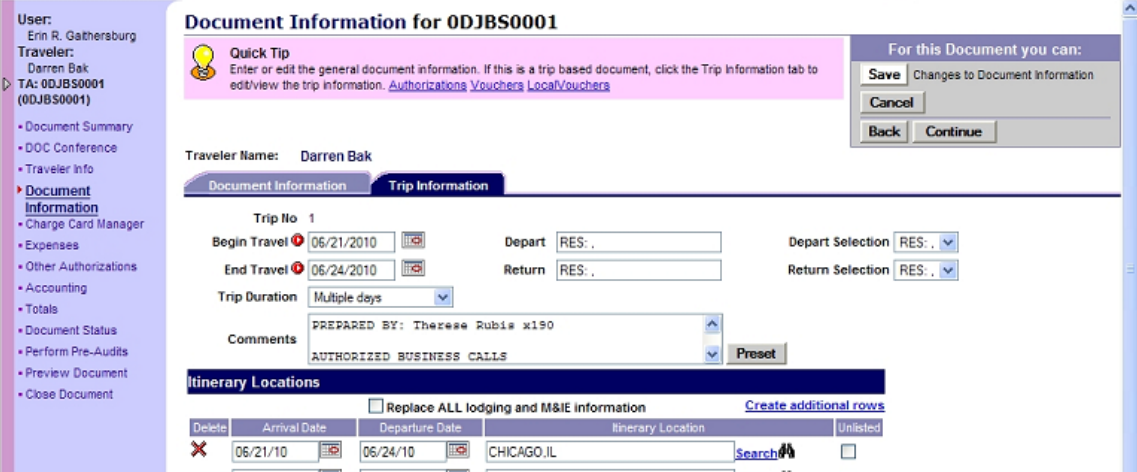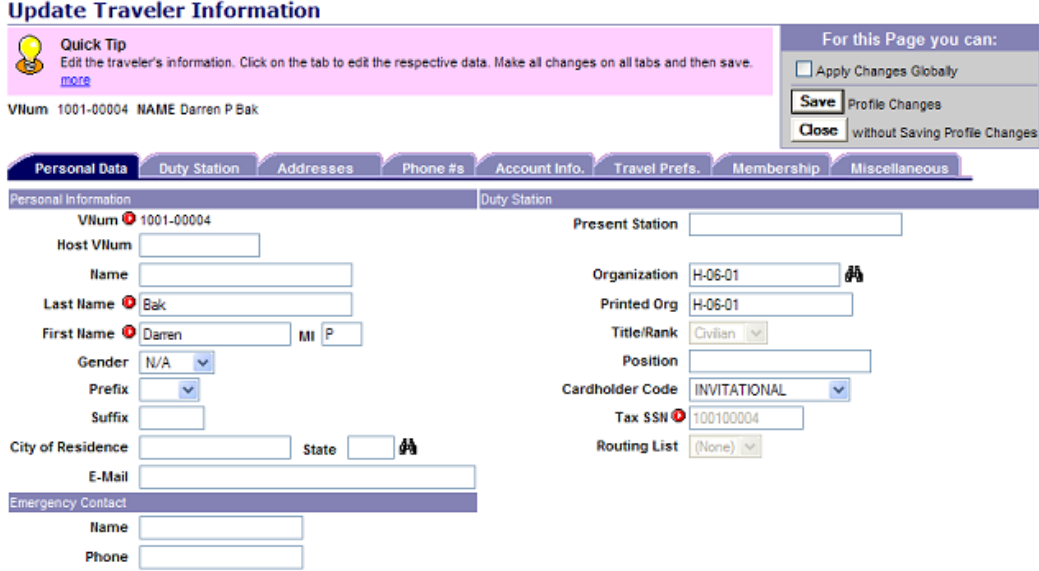| Step	Action
1	From the ***Home*** screen: ➢ Click Create New Document from the ***Document Toolbar***
2	For a Group Administrator, you will need to select a traveler by clicking on the Lookup icon 🔍 by either the VNum or Traveler Name field. **New Document** 💡 Quick Tip To select a traveler, click on the VNum or Traveler Name lookup button. more VNum 🔴 [ ] 🔍 Traveler Name (Enter last name and click lookup) 🔴 [ ] 🔍

Step	Action
2a	If you chose VNum lookup icon, you will get a list of travelers you have access to showing in vendor number order. If you chose Traveler Name, you will get a list of travelers you have access to showing in alphabetical order. In either case, click on the VNum to select your traveler.
	Note: You can do searches on either vendor numbers or last names by typing them in the fields provided and clicking SEARCH.

Step	Action
2b	The *New Document* screen appears with your traveler's name and vendor number filled in. **New Document** Quick Tip To select a traveler, click on the VNum or Traveler Name lookup button. *more* VNum 1001-00004 Traveler Name (Enter last name and click lookup) Bak, Darren P Document Type For this Document you can: Create this Document Add Traveler to Travel Manager ➢ Click on the **Document Type** drop-down listing and select *TA* ➢ Click the **Create** *(this Document)* button
3a	The *Document Information* screen appears with the *Document Information* tab highlighted and fields displaying. Any field with the red arrow icon next to it is a mandatory field and must be filled in. **Document Information** Quick Tip Enter or edit the general document information. If this is a trip based document, click the Trip Information tab to edit/view the trip information. *Authorizations Vouchers LocalVouchers* For this Document you can: Create Document Cancel Traveler Name: **Darren Bak** Document Information Trip Information Document Type TA Document Name Report Date 09/27/2010 TA# ☐ Sponsored Travel Currency U.S. Dollar Type Code Purpose Code Document Description Document Default Accounting Code Default Accounting Code Org Enter the following information: ➢ **Document Name** = *Same as TA#* ➢ **TA#** = *Use the first one listed on your domestic log* ➢ **Type Code** = *1-SINGLE-DOMESTIC* ➢ **Purpose Code** = *3-TRAINING ATTENDANCE* ➢ **Document Description** = *To attend training in Chicago, IL* ***Report Date automatically populates with current system date***

Step	Action
3b	Click on the **Trip Information** tab. If you click the **Create** button prior to clicking the tab you will receive an error message. Clicking the **OK** button will take you to this tab. **Document Information** Enter the following information in the top part of the screen: ➢ **Begin Travel** = *06/21/##* ➢ **Depart** = *RES* ➢ **End Travel** = *06/24/##* ➢ **Return** = *RES* ➢ **Comments =** *CBA OBLIGATION #:00191674 Organization ID:142002 TRAVELER PO#:00191673*
	Notes: The Depart & Return fields have a drop-down list to the right of them. Use a value contained in the drop-down list to populate the Depart & Return fields. *These fields will not be populated until some traveler information is added and saved to the traveler's profile.* *Entering the CBA Obligation information here is only for training purposes, in production the system will do that step upon approval/datalinking the TA.*
3c	The values selected in the Begin & End Travel dates will automatically populate in the **Itinerary Location** area. These dates must be filled in prior to filing in the *Itinerary Location* field.
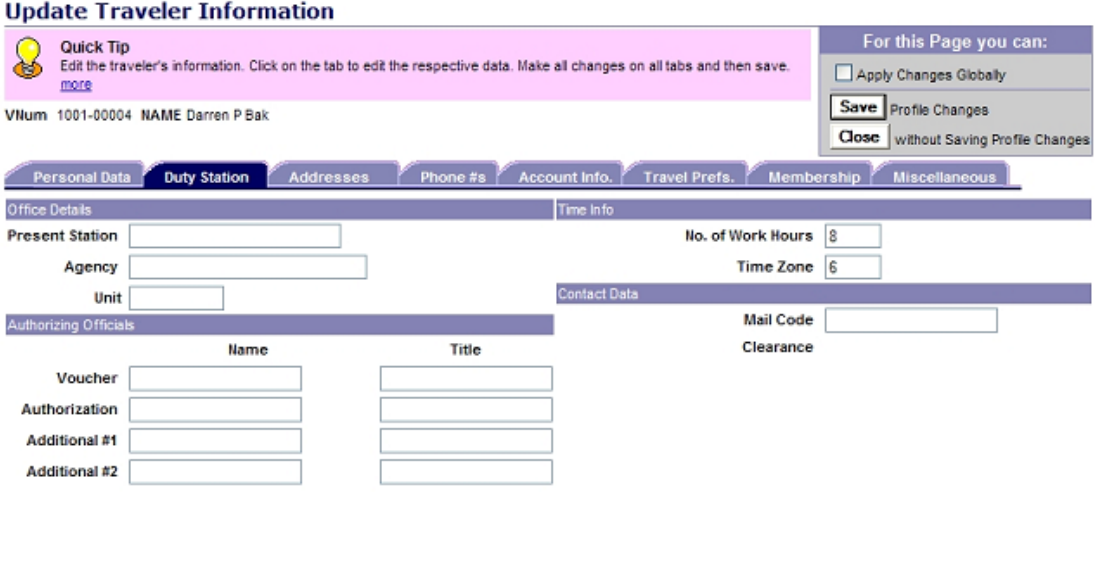
Step	Action
	Notes: If a mistake is made under the Begin/End Travel fields, the same mistake will show on the Arrival/Departure Date fields. You will have to manually change each field. *When attempting to correct the Arrival/Departure Date fields, another line will appear below with the correct dates, just ignore those dates, they will disappear when you finally create the document.*
3c1	There are two different way in order to look up a location. The first is to: ➢ Click the **Lookup** 🔍 icon This will open a new window that allows to search by country or state. Once a State/County has been selected, the Location field will populate with only the active records to choose from. ➢ Select the one you want (**Chicago, IL**) ➢ Click the [Use] *(Location)* button The field will then be populated with the selection. ➢ Click the [Create] *(Document)* button
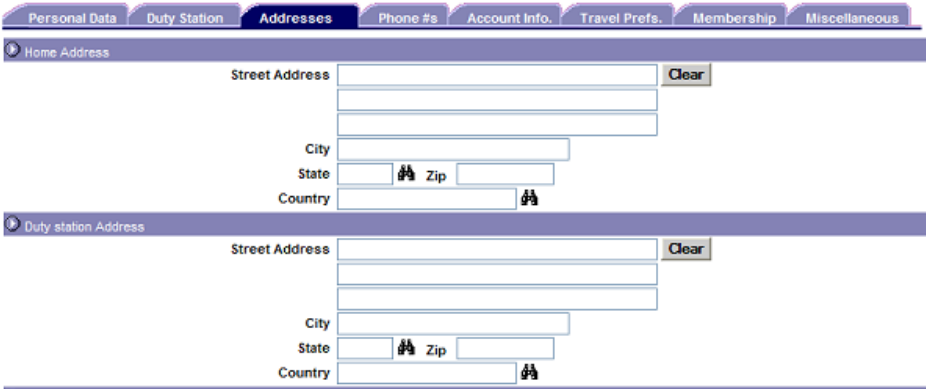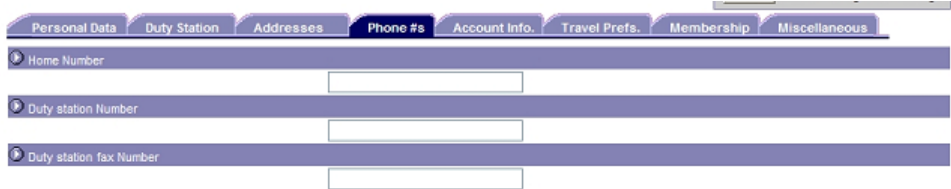
Step	Action
3c2	The second way is to enter the location in the ***Itinerary Location*** field: ➢ Type in the field, the name or partial name and click **Search** *[Itinerary Locations table screenshot showing "chica" typed in Itinerary Location field with Arrival Date 06/21/10 and Departure Date 06/24/10]* If there is more than one location with the same name, a drop-down listing of possible matches will appear below the field. Use the drop-down arrow to select the correct one. *[Itinerary Locations table screenshot showing CHICAGO,IL with drop-down listing CHICAGO,IL and CHICAGO-O'HARE IAP ARS,IL]* If this is the only location, it will automatically fill in the location area. *[Itinerary Locations table screenshot showing BOSTON,MA]*
	Notes: *It is better to do a search on a partial name rather than the whole name, as the system if looking for an actual location and the name must be typed exactly the way it is in the system.* *If you type a partial location and clicked search but nothing came up, take a look to see if what you typed is correct. If it is, you may want to use the lookup icon to see if it is an active location in the per diem location table.*

Step	Action
4	The ***Document Information*** screen still appears but the ***Document Toolbar*** now has different options available. It will also show your Document Name & TA#. The top of the screen will show the Document Name and the Create button is now Save. To edit the traveler information click on **Traveler Info** in the ***Document Toolbar*** **Notes:** *The Traveler Information can only be accessed and/or changed by a traveler or Group Administrator after a document has been created.* *A new functionality was added to allow Group Administrators the ability to edit a traveler's record outside of a document, through the Administration Module. However, they will only have the ability to edit the travelers in their group.*
5	The ***Update Traveler Information*** screen appears with limited data entered.
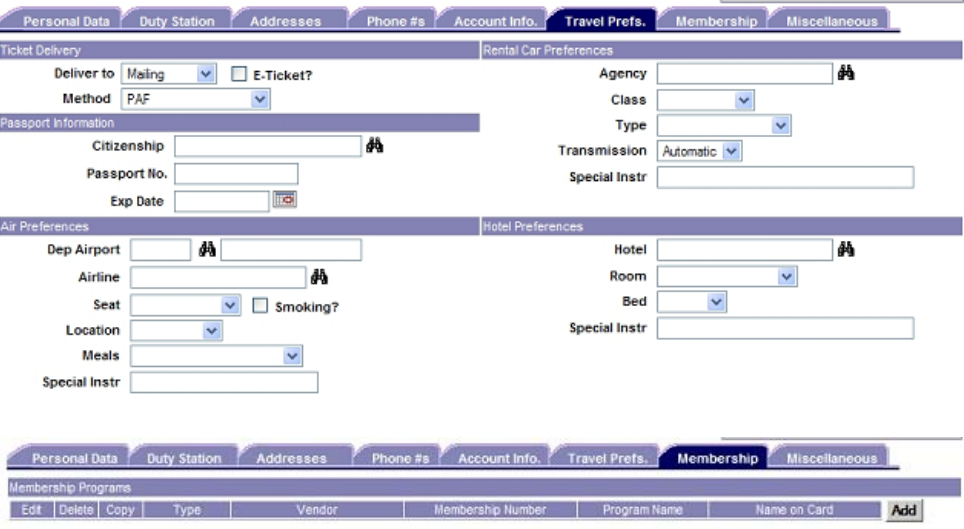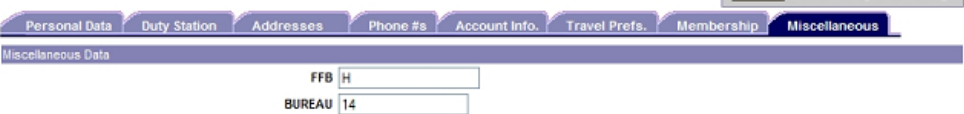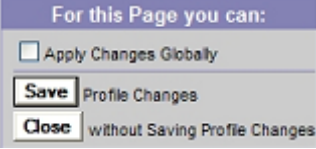
Step	Action
5a	On the ***Personal Data*** tab enter the following information, if not filled in: ➢ **City of Residence** ➢ **State** ➢ **Present Station (Duty Station) – For Employees ONLY** ***By entering this information on this tab, it will transfer to other tabs. These fields are also what will populate on the Document Information screen - Trip Information tab - Depart/Return Selection fields.*** Verify the following information: ➢ **First Name** ➢ **Last Name** ➢ **Middle Initial** ➢ **Email Address – For Invitational Travelers – may want to make sure it is the address of the preparer of the travel document.** Make any changes to the traveler's personal information as necessary.
	Note: Certain fields (i.e. Organization) can not be changed by the traveler or preparer.

Step	Action
5b	Click on the ***Duty Station*** tab and enter the following information: ➢ **Present Station** (if done on the previous tab will automatically fill in here) ➢ **Voucher Name and Title** ➢ **Authorization Name and Title** ➢ **(optional) Additional #1 Name and Title** Verify the following information: ➢ **Number of Work Hours** (should be 8) ➢ **Time Zone** (should be 6=ET, 7=CT, 8=MT, 9=PT)
	Notes: The Voucher & Authorization Name/Title fields are what will print out on the hard copy. *The Additional #1 & #2 Name Title fields are for additional signatures that may be needed, for example foreign travel.*
5c	Click on the ***Address*** tab and enter the following information:

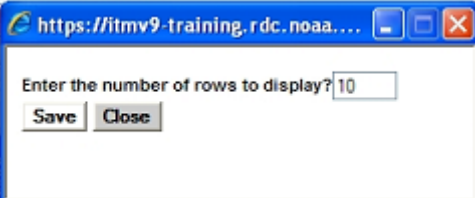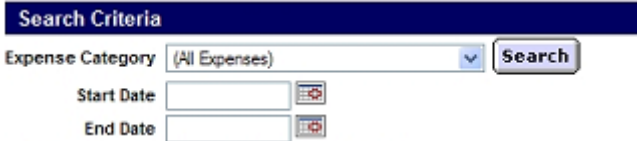| Home Address	Duty Station Address
Street Address **City** **State** **Zip**	**Street Address** **City** **State** **Zip**

Step	Action
	Note: *The address that prints out on the hard copy will be the one entered on the Home Address section.*
5d	Click on the *Phone #s* tab and enter the following information: ➢ **Home Number** ➢ **Duty Station Number** ➢ **Duty Station FAX Number**

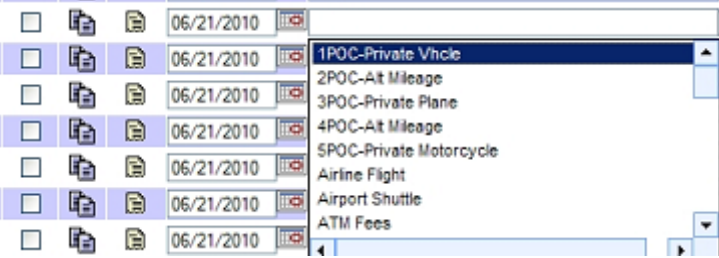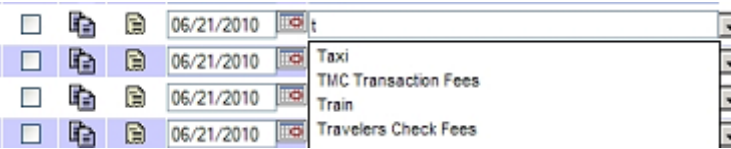| Step	Action
5e	Click on the *Account Info.* Tab and do the following: ➢ Click on the **Lookup** 🔍 icon A new window appears listing all ACCS codes that the traveler has available to them based off their organization. ➢ Search for the label name or click on the **Label** to select that ACCS code to be the default for the traveler.
	Notes: *Users may search on a full or partial label name. They may not search using the classification code information.* *Only the first 20 accounting codes will appear in alphabetical order by label name.* *A default accounting should only be added to the traveler if they usually use that accounting for all trips. If the traveler uses multiple ones throughout the year, you may want to skip this step.*

Step	Action
5f	The *Travel Prefs. & Membership* tabs are only used if a traveler or group administrator wishes to save information pertaining to their travel, such as aisle seating or hotel/car membership programs. **Note:** *These tabs are for information only. They do not transfer to the Travel Management Center.*
5g	The *Miscellaneous* tab fields are entered by the Help Desk. This information pertains to what Field Finance Branch and Bureau the traveler belongs to.
5h	To save the changes: ➢ Click the **Apply Changes Globally** checkbox (Done **ONLY IF** this is to be the saved as the default information for all future documents) ➢ Click the **Save** *(Profile Changes)* button (Done **ONLY IF** this information is to be changed for this document only without the checkbox being checked) The screen will save the information and the *Document Summary* screen will appear. **For training purposes --- Do NOT click the checkbox --- only click SAVE**.

Step	Action
6	The *Document Summary* screen is broken into different sections. You will have to use the scroll bar on the right to view the other sections.

Document Summary for Travel Authorization 0DJBS0001

Step	Action
6a	Each of the Section Names, such as ***Document Status or Expense Details***, is clickable and will take you to that screen. If there is data already entered in that area, the information will show up below the Section Name. To the left of the Section Names is an arrow ⊙ that is clickable and will either expand or shrink the section. *(Expense Details table shown)*
6b	Up at the top right of the screen is a Print link. This allows a preparer to print this information out as it is shown on the screen. It is **NOT** the official hard-copy document.
7	Click on Expenses in the ***Document Toolbar*** to bring up the ***Edit/Enter Expenses*** screen with M&IE and Lodging costs already filled in based upon what was entered on the itinerary. *(Edit/Enter Expenses screen shown)*

Step	Action
7a	In the middle section of the screen you will see four links. The first time entering a document, you will want to click on the *Customize Display* link. Expense Entry Customize Display Add Rows Prev 25 Next 25 A new window will open allowing you to change the number of lines of expenses displayed on the screen. The default is 10. We suggest you change the 10 to 25 and click **Save**. https://itmv9-training.rdc.noaa.... Enter the number of rows to display? 10 Save Close The screen will refresh now displaying the number of lines you selected. *Notes: It is suggested not to do change it above 25 lines as it will affect how long it takes to make changes or save. It could possibly also put the system in a perpetual loop where nothing will be changed or saved.* *This change is for the person creating the document. It is not associated to the traveler.*
7b	The other links in that middle section will do the following: **Add Rows** – Will add 5 more blank rows at the bottom of the screen **Prev #** - Will go to the previous # of records (default is 10) **Next #** - Will go to the next # of records (default is 10) *If you made a change to the number of rows to display the Previous & Next links will show the number that was selected.*
7c	The *Search Criteria* is something to be utilized more on the voucher side, as it "filters" what is shown on the screen based off the expense category or Start/End date entered and searched on. Search Criteria Expense Category (All Expenses) Search Start Date End Date

Step	Action
7d	The actual expenses can be entered either by clicking the drop-down arrow to select from the list of values: **OR** Type in a value, which could have an option in the list of values or could not be part of the list of values. **Notes:** *If an "ad-hoc" value is entered into the field, the expense category will need to be chosen from a list of values.* *If the value is chosen from the list, the expense category and payment method will automatically be populated.* *A payment method should never be changed, EXCEPT for when an airline charge is actually reimbursable to the traveler.*
7e	In most expenses, the amount of the expense can be entered directly into the *Cost* field. There are some exceptions. To get into the details of the expense, click on the *Expense Detail* icon, which can be found to the left of the *Cost* field.
7f	There are three costs that the detail area will need to be filled out: ➢ Mileage ➢ Airline Flight ➢ Lodging (for M&IE costs)
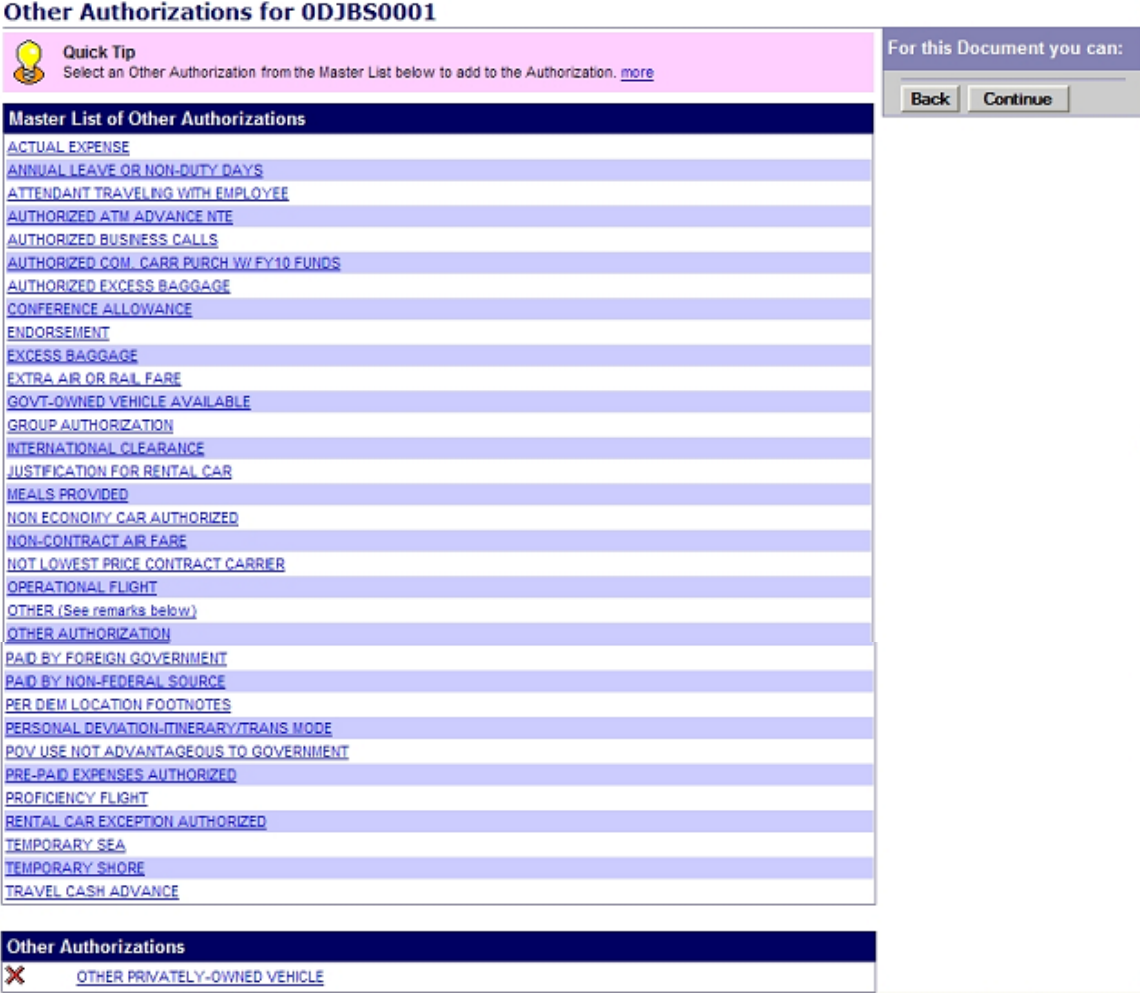
Step	Action
7f1	Mileage details, will allow the preparer to enter the miles and the system will calculate the total cost based upon the date (giving the correct mileage rate) and the number of miles entered. This can be done on the *General Details* tab. Mileage **must** be calculated this way or the system will see it as an error. The *Mileage Details* tab, allows the preparer to enter the details about the mileage – to and from locations. Not usually used for domestic trips – more for Local Vouchers. Once you have the information entered, you will need to click *Use* (*Expense Detail Updates)* button to take the information back to the *Expenses screen.*
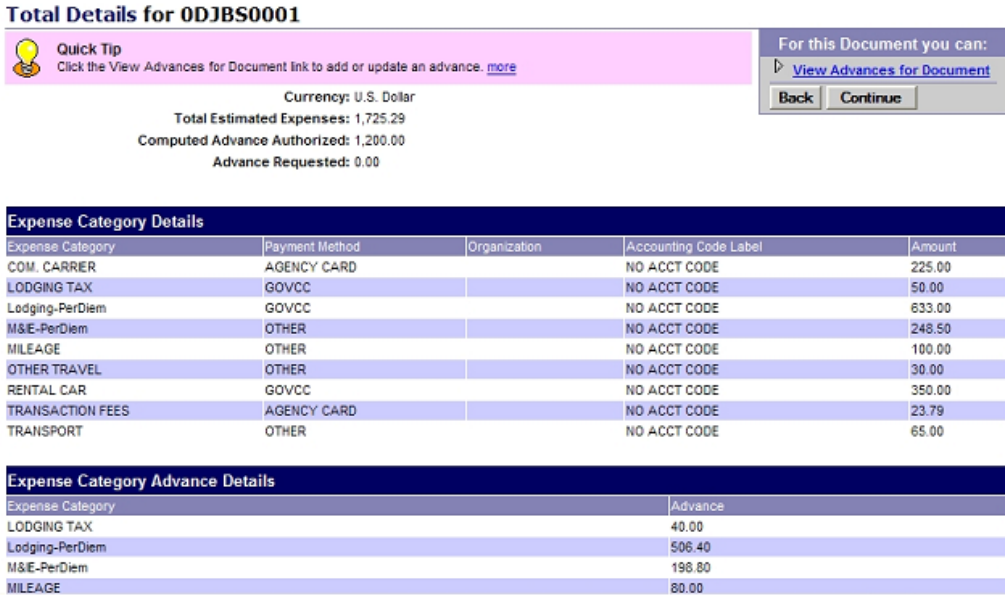
Step	Action
7f2	The Airline Flight details, will allow the preparer to enter specific information pertaining to the airline, such as cost and class. The cost can be entered on the *General Details* tab in the *Expense Cost* field or it can be entered on the *Ticketed Transportation Details* tab, where the class can also be entered. If entering the cost, do it in the **Ticket Value** field. By entering it there, the cost will automatically fill in the Expense Cost field on the other tab. Ticket Number should be filled in, which is usually entered on the voucher. Once you have the information entered, you will need to click *Use* (*Expense Detail Updates)* button to take the information back to the *Expenses screen*.

Step	Action
7f3	Anything concerning the Lodging or M&IE costs will need to be changed on the details from the **Lodging** line. The *General Details* tab allows the preparer to make changes to the lodging cost and change it to an actual cost, by entering the cost in the *Expense Cost* field and using the drop-down for the *Expense Category* to select Lodging - Actuals. The *Lodging Details* tab allows the preparer to enter conference allowance amounts which affect the lodging costs. It also allows the preparer to enter leave data, which will affect both lodging and M&IE costs. There's also a place if any meals are provided or if you need to override M&IE costs in general. Once you have the information entered, you will need to click *Use* (*Expense Detail Updates)* button to take the information back to the *Expenses* screen.

Step	Action
7g	Any additions not saved will not be saved if your screen refreshes – like clicking next or changing your display. There is not an automatic save to this screen.
7h	Enter the following information on the ***Edit/Enter Expenses*** screen: Airline Flight $225.00 (Class = Y) TMC Transaction Fee $23.79 Rental Car $350.00 Gas-Rental/Govt Car $65.00 Parking Fees $30.00 Hotel Tax $50.00 1POC-Private Vhcle 50x4 = total mileage ➢ Click the $\boxed{\text{Save}}$ *(Expense Changes)* button when completed
	***Notes:** If a transaction fee is reimbursable to the traveler, the Expense Category "Other" must be chosen.* *It is better to over estimate than under estimate. If you under estimate to much, an amendment may have to be done and approved prior to submitting the voucher.*

Step	Action
8	Click on Other Authorizations in the ***Document Toolbar*** to open up the ***Other Authorizations*** screen. **Other Authorizations for 0DJBS0001** Quick Tip Select an Other Authorization from the Master List below to add to the Authorization. more For this Document you can: Back Continue **Master List of Other Authorizations** ACTUAL EXPENSE ANNUAL LEAVE OR NON-DUTY DAYS ATTENDANT TRAVELING WITH EMPLOYEE AUTHORIZED ATM ADVANCE NTE AUTHORIZED BUSINESS CALLS AUTHORIZED COM. CARR PURCH W/ FY10 FUNDS AUTHORIZED EXCESS BAGGAGE CONFERENCE ALLOWANCE ENDORSEMENT EXCESS BAGGAGE EXTRA AIR OR RAIL FARE GOVT-OWNED VEHICLE AVAILABLE GROUP AUTHORIZATION INTERNATIONAL CLEARANCE JUSTIFICATION FOR RENTAL CAR MEALS PROVIDED NON ECONOMY CAR AUTHORIZED NON-CONTRACT AIR FARE NOT LOWEST PRICE CONTRACT CARRIER OPERATIONAL FLIGHT OTHER (See remarks below) OTHER AUTHORIZATION PAID BY FOREIGN GOVERNMENT PAID BY NON-FEDERAL SOURCE PER DIEM LOCATION FOOTNOTES PERSONAL DEVIATION-ITINERARY/TRANS MODE POV USE NOT ADVANTAGEOUS TO GOVERNMENT PRE-PAID EXPENSES AUTHORIZED PROFICIENCY FLIGHT RENTAL CAR EXCEPTION AUTHORIZED TEMPORARY SEA TEMPORARY SHORE TRAVEL CASH ADVANCE **Other Authorizations** ✖ OTHER PRIVATELY-OWNED VEHICLE It gives the preparer the ability to put some specific authorization information to the document by clicking on the other authorization link (i.e. authorized business calls) to add it to the document and then click on the link under the Other Authorizations to add remarks to it. The other authorization on the hard copy will be under #5 and the remarks will be under #8. Some of these authorizations get automatically added based upon the expenses that were added (i.e. POV). For this exercise, just verify that POV has been added as an "Other Authorization"
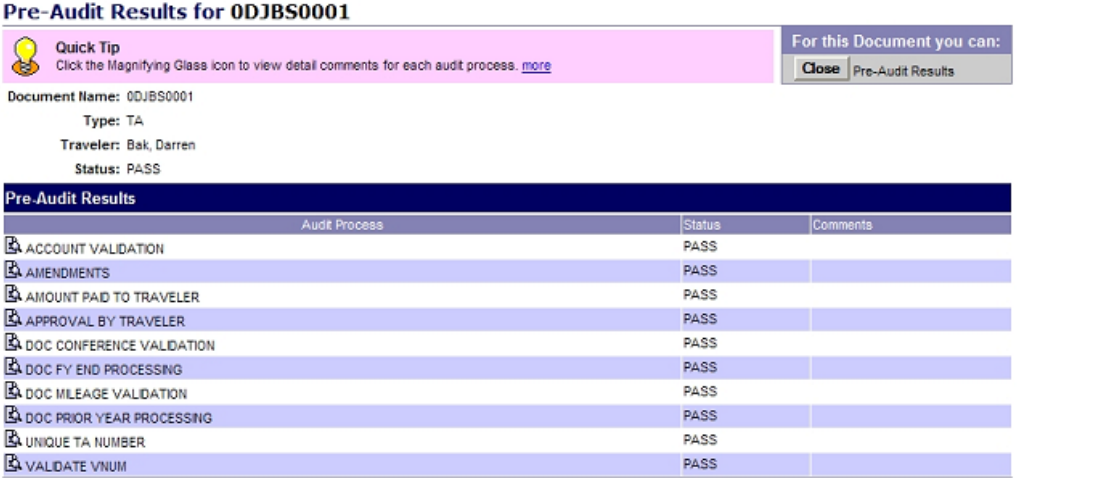
Step	Action
9	Click on Accounting in the **Document Toolbar** to open up the **Available Accounting Code** screen. **Available Accounting Code for 0DJBS0001** The first time going to the accounting for the traveler, even if you added a default accounting for them, will not show up on this document. The changes for the accounting you did on the traveler information will not take place until the next document.
9a	The **Available Accounting Code** screen is divided into the following sections: ➢ **Enter Search Criteria** ➢ **Master Accounting Code** ➢ **Accounting Code for Document Name** It also has the ability for a preparer to Add a new accounting code to their document and/or master list.
9b	The **Search Criteria** section allows a preparer to either: Search on a full or partial label name against their master list OR Retrieve a code by the full label name from another organization
9c	The **Master Accounting Code** section will list all accounting codes that had been added to the preparer's organization.

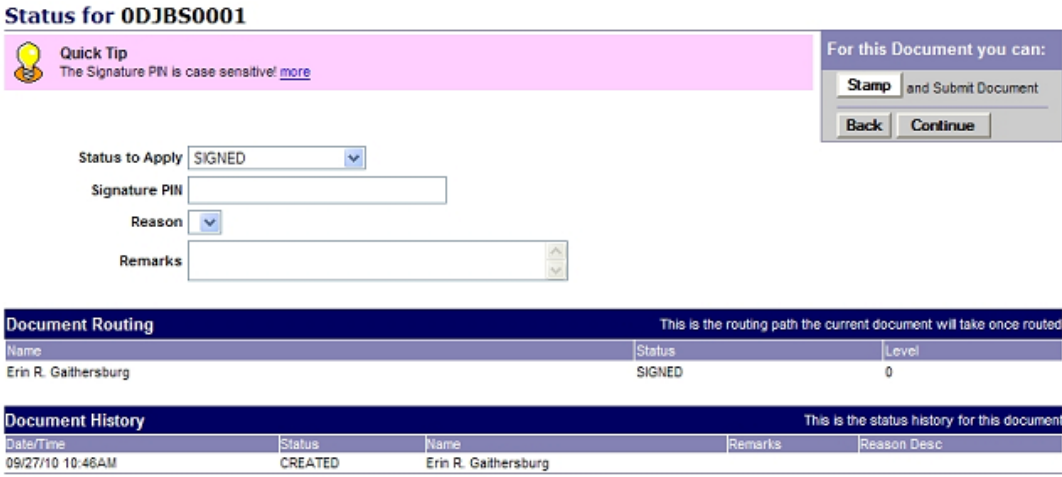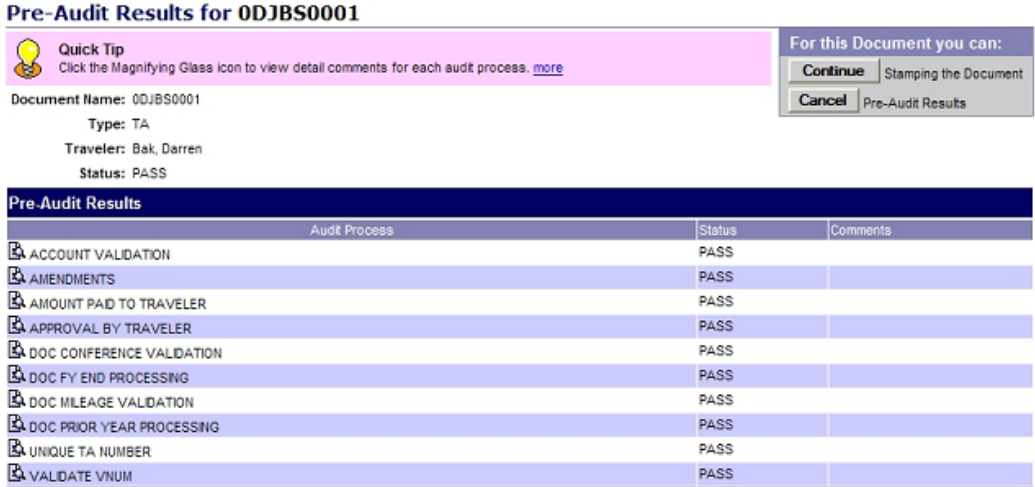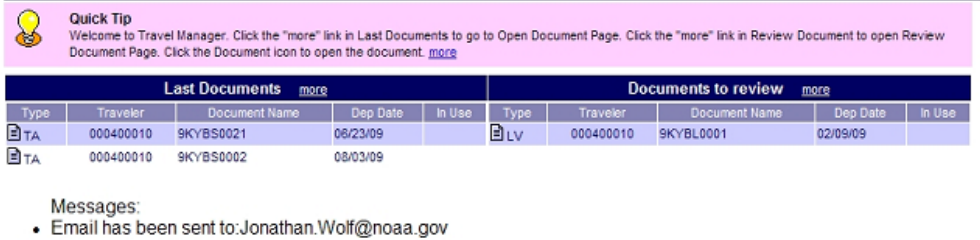| Step	Action
9d	The *Accounting Code for Document Name section* will list all accounting codes that have been associated to this document. If a traveler was set up with a default accounting prior to this document, that code will show at the bottom. If the traveler does not have a default accounting, one will need to be selected from the Master Accounting Code section or be added manually using the **Add** button. *Note: A preparer can add up to five different account codes to one document. With more than one account code associated to the document, the preparer will have to allocate the costs to the various codes.*
9e	For this document, please find and select the label **General Travel FY10**
10	Click on Totals in the *Document Toolbar* to open up the *Total Details* screen. **Total Details for 0DJBS0001** Quick Tip Click the View Advances for Document link to add or update an advance. more For this Document you can: ▷ View Advances for Document Back Continue Currency: U.S. Dollar Total Estimated Expenses: 1,725.29 Computed Advance Authorized: 1,200.00 Advance Requested: 0.00 **Expense Category Details** 	Expense Category	Payment Method	Organization	Accounting Code Label	Amount	 COM. CARRIER / AGENCY CARD / NO ACCT CODE / 225.00 LODGING TAX / GOVCC / NO ACCT CODE / 50.00 Lodging-PerDiem / GOVCC / NO ACCT CODE / 633.00 M&E-PerDiem / OTHER / NO ACCT CODE / 248.50 MILEAGE / OTHER / NO ACCT CODE / 100.00 OTHER TRAVEL / OTHER / NO ACCT CODE / 30.00 RENTAL CAR / GOVCC / NO ACCT CODE / 350.00 TRANSACTION FEES / AGENCY CARD / NO ACCT CODE / 23.79 TRANSPORT / OTHER / NO ACCT CODE / 65.00 **Expense Category Advance Details** Expense Category / Advance LODGING TAX / 40.00 Lodging-PerDiem / 506.40 M&E-PerDiem / 198.80 MILEAGE / 80.00
10a	This screen is broken out into the following sections: ➢ **Total Estimated Expenses & Advance Authorized** ➢ **Expense Category Details** ➢ **Expense Category Advance Details**
10b	The *Total Estimated Expense/Advance Authorized* section is at the top. It will give the preparer a total estimated amount of the authorization as well as the computed advance amount that is authorized. This is all based off what had been entered for the travel expenses.
10c	The *Expense Category Details* section gives the preparer the totals using a breakout by Expense Category, payment method and accounting.
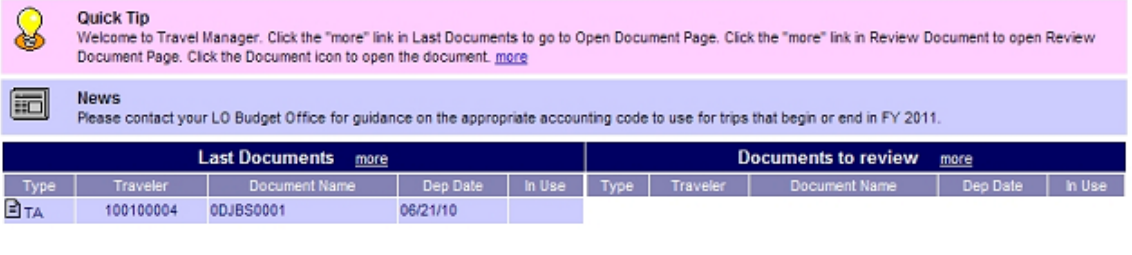
Step	Action
10d	The *Expense Category Advance Details* section gives the preparer a breakout of what expense categories that were used to calculate the Advance Authorized total.
11	Click on Preview Document in the *Document Toolbar* to have a new window open with the print preview of your travel document.
11a	The document opens up in an Adobe PDF file. This give the preparer the ability to Print or Save the document using the icons found on the Adobe Toolbar. ( )
	Notes: Any system generated comments will not appear in section 8 of the document until after the approving official has approved the document. This includes the purchase order (PO) & CBA Obligation numbers. *You may print your document at this point, but you may have to reprint the document after the approving official has approved the document. This is due to the requirement for the Travel Management Center (i.e. AdTrav)to have the CBS Obligation number as well as Document History Page that shows the approval in order to get the tickets issued.*
11b	To close this preview, you may click the red "x" in the upper right hand corner. Just be careful that if you had maximized the screen, you only single click the "x" otherwise you may end your Travel Manager session prematurely.

Step	Action
12	Click on `Perform Pre-Audits` in the ***Document Toolbar*** to open up the ***Pre-Audit Results*** screen. **Pre-Audit Results for 0DJBS0001** **Quick Tip** Click the Magnifying Glass icon to view detail comments for each audit process. *more* For this Document you can: **Close** Pre-Audit Results Document Name: 0DJBS0001 Type: TA Traveler: Bak, Darren Status: PASS **Pre-Audit Results** | Audit Process	Status	Comments
ACCOUNT VALIDATION	PASS	
AMENDMENTS	PASS	
AMOUNT PAID TO TRAVELER	PASS	
APPROVAL BY TRAVELER	PASS	
DOC CONFERENCE VALIDATION	PASS	
DOC FY END PROCESSING	PASS	
DOC MILEAGE VALIDATION	PASS	
DOC PRIOR YEAR PROCESSING	PASS	
UNIQUE TA NUMBER	PASS	
VALIDATE VNUM	PASS		 *Note: It is a good practice to verify there are no errors with your document prior to submitting it for review and approval.*
12a	The ***Pre-Audit Results*** screen will show the whole document status as well as the individual audit processes the system is checking along with the status of those processes. The processes are: Blank or WARN = Warning FAIL = Failure PASS = Pass A warning just gives preparer an idea that something is different with the document, but will not stop the document from the signing/stamping process. A failure means that something is wrong with the document or a process within the document. These failures have to be fixed prior to the signing/stamping process. A pass lets the preparer know that there were no issues with all of the Travel Manager audit process, so the document is ready for the signing/stamping process.

Step	Action
13	Click on Document Status in the **Document Toolbar** to open up the **Status** screen.

Step	Action
13a	This screen is broken out into the following sections: ❯ **Status to Apply/Signature PIN** ❯ **Document Routing** ❯ **Document History**
13b	The **Status to Apply/Signature PIN** section will automatically select the proper status, which in this case should be signed. The preparer would then enter their signature PIN in that field and then click the Stamp button. *Note: The Status to Apply would only have to be selected if making a change after the initial document had been submitted for routing.*
13c	The **Document Routing** section shows the routing that needs to be accomplished. From the creation of the document, it will only show the name of the person who needs to sign the document, which will be the one who prepared it. Once the document has been stamped signed the routing list for reviewers/approvers will then show based upon the criteria set up in the routing lists.
13d	The **Document History** section shows every status that the document has gone through. This includes any amendments or adjustments as well as the following statuses: CREATED SIGNED REVIEWED PROCESSED APPROVED DATALINKED

Step	Action
	Note: All statuses are in the past tense, whether they have been done or not. If you do not see a status you think should be in the history, it may be because the status has not been stamped yet, so check the Document Routing section.
13e	➤ Enter your *Signature PIN* ➤ Enter your *Remarks* ➤ Click the Stamp *(and Submit Document)* button The *Pre-Audit Results for Document #* screen appears: **Pre-Audit Results for 0DJBS0001** Quick Tip Click the Magnifying Glass icon to view detail comments for each audit process. more For this Document you can: Continue — Stamping the Document Cancel — Pre-Audit Results Document Name: 0DJBS0001 Type: TA Traveler: Bak, Darren Status: PASS **Pre-Audit Results** | Audit Process	Status	Comments
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ACCOUNT VALIDATION	PASS	
AMENDMENTS	PASS	
AMOUNT PAID TO TRAVELER	PASS	
APPROVAL BY TRAVELER	PASS	
DOC CONFERENCE VALIDATION	PASS	
DOC FY END PROCESSING	PASS	
DOC MILEAGE VALIDATION	PASS	
DOC PRIOR YEAR PROCESSING	PASS	
UNIQUE TA NUMBER	PASS	
VALIDATE VNUM	PASS		

Step	Action
13f	➢ Verify the document status is PASS ➢ Click the [**Continue**] *(Stamping the Document)* button The document will then be routed to the first level of the electronic approval process and you will be taken back to the ***Home*** screen where a message toward the bottom stating and email has been sent to "email address"—FOR EMPLOYEES ONLY For EXCEPTED TRAVELERS – The ***Home*** screen will appear with the document appearing in the *Last Documents* area. The preparer will have to inform the Approving Official when the document is ready for approval in the system. ***Notes:*** *An email will be sent to the first level of review/approval set up in the routing. If there are 3 people that have been set up in the routing list, you will see all of their emails listed on this screen.* *Until the document has been approved, a preparer may go back in and adjust the document. If that happens, the preparer will have to re-stamp the document signed for the changes to go through the routing process.*