

Non-responsive header

**From:** Wood, Nikki  
**Sent:** Wednesday, March 27, 2019 12:25 PM  
**To:** Wong, Lela  
**Cc:** Conklin, Jeanne; Wooden-Aguilar, Helena; Atcherson, Aileen; Spencer, Vickie; Luebbering, Gregory  
**Subject:** FW: Follow-Up Travel Items

Lela,

As requested, below is a screenshot showing the use of the agreed upon language to be included in the travel voucher for the prior Administrator (after being provided to the AO on 1/11/2018):

https://cge.concursolutions.com/?vsess=8&ssn=aje70w0\$5T0dQoqZeA9:P8VchastLpa31CtB5svBy7wEfoQE&ddoc - Internet Explorer

Traveler: EDWARD PRUITT VCH: VCH170795 (TAA05E66) **Final Voucher**

### Document Summary for VCH170795 (View-only)

**Traveler** Traveler ID: 02335361 Traveler Name: EDWARD PRUITT Organization: EPA01110

**Document Information** Travel Dates: 01/19/2018 - 01/19/2018 Currency: U.S. Dollar Type: TEMPORARY DUTY

TA Num: TAA05E66 Document ID: Purpose: 2-INFORMATIONAL MEETING Location Type: CONUS-DOMESTIC  
 Document Details: The Administrator will be traveling to Atlanta, Georgia to visit the EPA Regional Office. Please note, this trip was cancelled after the tickets were issued. Must voucher for the TMG fees billed to govcc.

Alert	Trip No.	Location Purpose	Itinerary Location	From	To	Per Diem Rates	Estimated Cost	Trip Comments
	1		ATLANTA, GA	01/19/18	01/19/18	148.00 / 69.00 (11/01/17-08/31/18)	67.99	Pursuant to Section (a)(3) of FTR 5301-10.123(a)(3)(i) this travel meets the requirements for approval of "other than coach-class" airfare.

**Reservations** View Reservation History **No Reservations**

Reservation Type	Vendor/Carrier	Last Date to Ticket	Cost	Lodging Location	Ticket #/Res. #	Date & Time	Emissions	Traveler
No Reservations								

**Expenses** Total Per Diem Expenses: 0.00 Total Non-Per Diem Expenses: 67.99

Expense Item	Receipts	Date	Source	Expense Description	Expense Category	Cost	Payment Method	Per Diem
Comments		01/09/2018		Travel Fee	Com. Carrier	53.24	GOVCC	
Comments: LB VIP Services								

VCH174453	Vch	TAA05GPU	Trip from Washington to Jerusalem/Tel Aviv, Israel and return	
VCH174128	Vch	TAA05H9	Trip from Orlando to Washington	
VCH173741	Vch	TAA05F24	Trip from Washington to Boston, MA and return.	
VCH172884	Vch	TAA05FN7	Trip from Washington to Reno/Las Vegas, NV and return.	POKKEC 02/13/2018 02/23
VCH172722	Vch	TAA05FR8	Trip from Washington, DC to Manhattan, NY to Tallahassee, FL to Orlando, FL and return.	H3H3FK 02/04/2018 02/13
VCH171698	Vch	TAA05CD9	Trip from Washington to Tokyo, Japan and return.	NJBFDE 01/31/2018 02/12
VCH170785	Vch	TAA05E66	Trip from Washington to Atlanta, GA and return.	DQDRXQ 01/20/2018 02/02
VCH170791	Vch	TAA05EKL	Dallas, TX to Washington, DC	01/19/2018 01/22
VCH169889	Vch	TAA059LX	Trip from Washington to Paris, FR to Rabat/Marrakesh, Morocco and return.	LYQXKJ 01/15/2018 01/23
VCH167822	Vch	TAA05A1F	Trip from Washington to Louisville, KY to Des Moines, IA and return.	12/09/2017 01/05
VCH167189	Vch	TAA059UY	Washington, DC to Orlando, FL and return	RVTJZA 11/30/2017 12/12
VCH166348	Vch	TAA05728	Trip from Washington to Charleston, SC then return.	GJM2IO 11/27/2017 12/09
				QOOCVV 11/09/2017 11/30

**Nikki Wood**

Office of the Controller - Policy and Training Branch  
 1300 Pennsylvania Ave NW  
 Washington DC, 20460  
 Phone 202-564-1784  
 Fax 202-565-3084

For additional information, please refer to the OC SharePoint site [OC SharePoint](#)

**From:** Wood, Nikki  
**Sent:** Monday, March 25, 2019 4:11 PM  
**To:** Spencer, Vickie <Spencer.Vickie@epa.gov>  
**Cc:** Atcherson, Aileen <Atcherson.Aileen@epa.gov>  
**Subject:** FW: Follow-Up Travel Items

Vickie,

Below is the email for the trip-by-trip language provided to the Administrator's office. The attached Executive Approval Framework is an older version (provided prior to being updated with the Administrator's travel).

Thanks,  
Nikki

**Nikki Wood**

Office of the Controller - Policy and Training Branch  
1300 Pennsylvania Ave NW  
Washington DC, 20460  
Phone 202-564-1784  
Fax 202-565-3084

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**From:** Wood, Nikki  
**Sent:** Thursday, January 11, 2018 9:41 AM  
**To:** Wooden-Aguilar, Helena <Wooden-Aguilar.Helena@epa.gov>  
**Cc:** Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>; Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Atcherson, Aileen <Atcherson.Aileen@epa.gov>; Hupp, Millan <hupp.millan@epa.gov>; Davis, Gail <Davis.Gail@epa.gov>; Jenkins, Juanita <jenkins.juanita@epa.gov>; Nelson, Khary <nelson.khary@epa.gov>; Luebbering, Gregory <luebbering.gregory@epa.gov>; Martini, Sarah <Martini.SarahJ@epa.gov>  
**Subject:** Follow-Up Travel Items

Good Morning,

Thank you again for taking the time to meet with Meshell, Sarah, and myself. Below (and attached) are the requested items discussed during yesterday's meeting. Once you've had a chance to review and provide feedback, we would be more than happy to discuss next steps or answer any additional questions you have.

- [Executive Approval Framework](#) - Outlines the appropriate approvers
- Authorizer, Preparer, and Traveler Tri-Folds (Attached)
- [Office of the Controller SharePoint Site](#) – Hosts Key Travel Updates (in the Ticker), and guidance for emergency/disaster travel and related waivers.
- "Other Than Coach-Class Travel": Language to be used for Administrator and/or the Administrator's Security Detail listed in the table below:

FIRST CLASS TRAVEL		
	FTR Section	Language
Administrator	<a href="#">FTR §301-10.123(a)(3)(i)</a>	<i>Pursuant to Section (a)(3) of FTR §301-10.123(a)(3)(i) this travel meets the requirements for approval of "other than coach-class" airfare.</i>



<b>Security Detail</b>	<u>FTR §301-10.123(a)(3)(ii)</u>	<i>Pursuant to <u>Section (a)(3) of FTR §301-10.123(a)(3)(ii)</u> this travel meets the requirements for approval of "other than coach-class" airfare.</i>
<b>BUSINESS CLASS TRAVEL</b>		
	<b>FTR Section</b>	<b>Language</b>
<b>Administrator</b>	<u>FTR §301-10.123(b)(2)(i)</u>	<i>Pursuant to <u>Section (b)(2) of FTR §301-10.123(b)(2)(i)</u> this travel meets the requirements for approval of "other than coach-class" airfare.</i>
<b>Security Detail</b>	<u>FTR §301-10.123(b)(2)(ii)</u>	<i>Pursuant to <u>Section (b)(2) of FTR §301-10.123(b)(2)(ii)</u> this travel meets the requirements for approval of "other than coach-class" airfare.</i>

Thank you,  
Nikki

**Nikki Wood**

Office of the Controller - Policy and Training Branch  
1300 Pennsylvania Ave NW  
Washington DC, 20460  
Phone 202-564-1784  
Fax 202-565-3084

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## Appendix G: Executive Approval Framework

*Guiding Principle:* When possible, every employee should have their travel and payroll approved by an individual in their supervisory chain of command. This framework outlines the acceptable alternatives when this principle cannot be met.

<b>AA'Ships</b>			
<i>If your organization's immediate office has a Principal Deputy Assistant Administrator and Deputy Assistant Administrator (or equivalent), the following framework is applicable. (currently OAR, OCSPP, OECA, OGC, and ORD).</i>			
Position	Approver	Backup	2nd Backup
Assistant Administrator	SRO, PDAA, or DAA Delegation: None	SRO, PDAA, or DAA Delegation: None	SRO, PDAA, DAA or OD designated by the DA Delegation: None
Principal Deputy Assistant Administrator	SRO or DAA Delegation: None	1. If Applicable, AAA or DAA or 2. SRO Delegation: None	1. If Applicable, AAA or DAA or 2. Office Director Designated by DAA or 3. SRO Delegation: None
Deputy Assistant Administrator	SRO or PDAA Delegation: None	1. If Applicable, AAA or DAA or 2. Office Director Designated by PDAA or 3. SRO Delegation: None	1. If Applicable, AAA or DAA or 2. Office Director Designated by PDAA or 3. SRO Delegation: None
Associate Assistant Administrator (If Applicable)	SRO, DAA, or PDAA Delegation: None	SRO, DAA, or PDAA Delegation: None	1. If Applicable, AAA or DAA or 2. Office Director Designated by PDAA, DAA, or 3. SRO Delegation: None
Deputy Associate Assistant Administrator (If Applicable)	SRO, AAA, DAA, or PDAA Delegation: None	SRO, AAA, DAA, or PDAA Delegation: None	SRO, AAA, DAA, or PDAA Delegation: None
Office Directors/Lab Directors	SRO, DAA, or PDAA (AAA or DAAA) Delegation: Senior Staff Member* that Reports Directly to SRO, PDAA, or DAA (AAA or DAAA).	SRO, DAA, or PDAA (AAA or DAAA) Delegation: Senior Staff Member* that Reports Directly to SRO, PDAA, or DAA (AAA or DAAA).	SRO, DAA, or PDAA (AAA or DAAA) Delegation: Senior Staff Member* that Reports Directly to SRO, PDAA, or DAA (AAA or DAAA).
Deputy Office Directors	Office Director Delegation: None	SRO Delegation: None	Designee of SRO** Delegation: None
Division Directors	Office Director or Deputy Office Director Delegation: None	Office Director or Deputy Office Director Delegation: None	Designee of Office Director** Delegation: None
SL/ST	SES Supervisor Delegation: None	SES Designee of SES Supervisor Delegation: None	SES Designee of SES Supervisor Delegation: None

## AA'Ships (continued)

*If your organization's immediate office only has a Single Deputy Assistant Administrator (or equivalent), the following framework is applicable. (currently OARM, OCFO, OEI, OIG, OITA, OSWER, and OW)*

Position	Approver	Backup	2nd Backup
Assistant Administrator	SRO or DAA (AAA) Delegation: None	SRO or DAA (AAA) Delegation: None	Office Director Designated by DAA or SRO (AAA) Delegation: None
Deputy Assistant Administrator	SRO, AAA, or Office Director Delegation: None	SRO, AAA, or Office Director Delegation: None	Office Director designated by SRO (AAA) Delegation: None
Associate Assistant Administrator (If Applicable)	SRO or DAA Delegation: None	SRO or DAA Delegation: None	Office Director designated by SRO or DAA Delegation: None
Office Directors	SRO or DAA (AAA) Delegation: Senior Staff Member that Reports Directly to DAA or SRO (AAA).	Office Director designated by SRO or DAA (AAA) Delegation: Senior Staff Member that Reports Directly to DAA or SRO (AAA).	Office Director designated by SRO or DAA (AAA) Delegation: Senior Staff Member that Reports Directly to DAA or SRO (AAA).
Deputy Office Directors	Office Director Delegation: None	Designee of Office Director** Delegation: None	Designee of Office Director** Delegation: None
Division Directors	Office Director or Deputy Office Director Delegation: None	Office Director or Deputy Office Director Delegation: None	Designee of Office Director** Delegation: None
SL/ST	SES Supervisor Delegation: None	SES Designee of SES Supervisor Delegation: None	SES Designee of SES Supervisor Delegation: None

\* Senior Staff Member is defined as a Chief or Staff or Director (or equivalent).

\*\* The Designee of the SRO or Office Director must be a Senior Staff Member as defined immediately above.



## Regions

Position	Approver	Backup	2nd Backup
Regional Administrator	SRO or DRA Delegation: None	SRO or DRA Delegation: None	SES Designated by the SRO or DRA Delegation: None
Deputy Regional Administrator	SRO (Optional: RA) Delegation: Senior Staff Member that Reports Directly to RA (If RA is an approver).	SES Designated by SRO (Optional: RA) Senior Staff Member that Reports Directly to RA (If RA is an approver).	SES Designated by SRO Delegation: None
SRO (Assistant Regional Administrator for Management)	DRA (Optional: RA) Delegation: Senior Staff Member* of the Immediate Office that Reports Directly to DRA (or RA).	SES Designated by DRA Delegation: Senior Staff Member* of the Immediate Office that Reports Directly to DRA (or RA).	SES Designated by DRA Delegation: Senior Staff Member* of the Immediate Office that Reports Directly to DRA (or RA).
Non-SRO Assistant Regional Administrators/Division Directors (or equivalent)	SRO or DRA Delegation: Senior Staff Member* of the Immediate Office that Reports Directly to DRA or SRO.	SRO or DRA Delegation: Senior Staff Member* that Reports Directly to DRA or SRO.	SES designated by SRO or DRA Delegation: Senior Staff Member* that Reports Directly to DRA or SRO.
Deputy ARA/Deputy Division Directors (or equivalent)	Supervising ARA/Division Director Delegation: None	SRO, DRA, or Designee of Supervising ARA/Division Director** Delegation: None	SRO, DRA, or Designee of Supervising ARA/Division Director** Delegation: None
SL/ST	SES Supervisor Delegation: None	SES Designee of SES Supervisor Delegation: None	SES Designee of SES Supervisor Delegation: None

\* Senior Staff Member is defined as a Chief of Staff or Division Director (or equivalent).

\*\* The Designee of the ARA/Division Director must be a Senior Staff Member as defined immediately above.

## Sign in to ConcurGov

1. Enter your **User Name** and **Password**
2. Click **Sign In**.

*If you are not sure how to sign in to ConcurGov, contact your Administrator.*

## Approvals on the Homepage

The Homepage has options for all users in the system, the below information describes section relevant to approvers.

- Use the **Shortcuts** section to approve documents and view previous approvals.
- The **Alerts** section shows any important expiration notices.
- The **Important Information** section shows information provided by your agency.
- The **Documents Awaiting Action** section lists all documents that you need to stamp, including documents you need to approve. From this section you can choose to work on approving just one document, or go to the full approvals screen.

## Search for Documents

1. Select **Approvals** from the primary navigation. This takes you to the **Approve All** page. In the secondary navigation, you can choose to narrow your results by selecting **Approve Authorizations**, **Approve Vouchers**, or **Search Previous Approvals**.
2. In the **Search Criteria** area, select the appropriate search options. Documents can be sorted by selecting on the column heading or by selecting from the **Sort Order** dropdown.

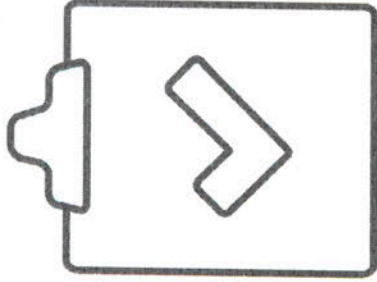
3. After you select your search criteria, click **Refresh Document List**. The system displays the documents that match your criteria in the **List of Documents** section.



## View Documents as a Auditor

An Auditor is usually a read-only role in the system. Please review your agency policy for any other actions you should take on the document.

1. On the **ConcurGov** homepage, click **Profile** in the upper right-hand of the page. Use the appropriate option in the **Acting as other user** section (most commonly **Book travel for any user (Self-assign)**) to search for the user you are auditing and select **Start Session**.
2. Select **Authorizations** or **Vouchers** from the main navigation.
3. Click the **Document Name** to either **Review Document** or **Preview Document**.

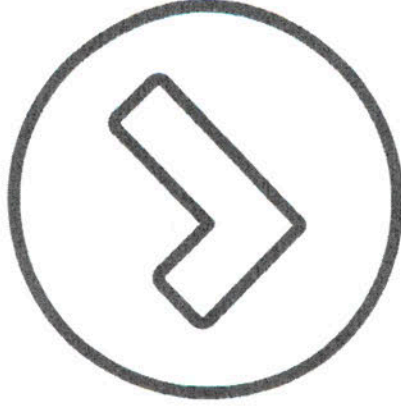


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CONCURGOV



# Federal Approving Official/ Auditor

## Quick Reference Guide

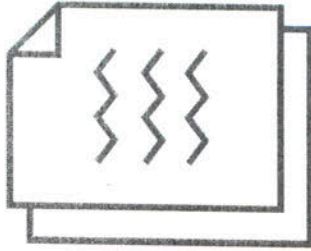
Revised: April 18, 2016

*Note: ConcurGov is configurable by your agency and may provide additional or less options than presented in this guide.*



## Reviewing Document Information

There are several ways to view information on a document to determine whether or not you want to stamp and route the document to the next approving official.



### Review Document

1. On the **Approvals** page, click the **Document Name**.
2. Select **Review Document** from the document actions list.
3. The **Document Summary** window displays.
4. Review the details of the document and close the window when finished.

### Preview Document

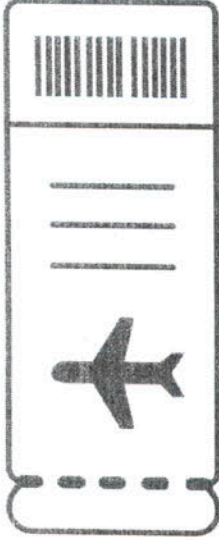
1. On the **Approvals** page, click the **Document Name**.
2. Select **Preview Document** from the document actions list.
3. Your browser will prompt you to open or save a PDF version of the document for review.

### View/Change Reservations

To change reservations, you must have the appropriate permissions. Please review your agency's policy prior to changing reservations. For more information about booking reservations, see the *QuickStart Guide for Federal Travelers*.

1. On the **Approvals** page, click the **Document Name**.
2. Select **View/Change Reservations** from the document actions list. The **Request** window displays.
3. On the **Request Status History** tab, view important information about the trip such as itinerary rule violations, traveler justifications, and in-policy options turned down.
4. On the **Travel Itinerary** tab, the trip itinerary is displayed and if you have the appropriate

permissions and agency policy allows, you can change reservations if necessary.

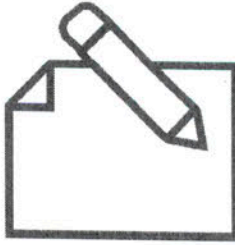


### Adjust a Document

To adjust documents, you must have the appropriate permissions. Please review your agency's policy prior to adjusting a document.

1. On the **Approvals** page, click the **Document Name**.

2. Select **Adjust Document** from the document actions list. If the



document was signed and has *never been* adjusted, the system displays the **Open Document Signature**

page. If the document was signed and was

*previously adjusted*, the system displays the

**Open Document Version** area. Select the

document on the top of the list that has two

asterisks (\*\*) after the name. You will be taken to the **Open Document Signature** page.

3. Click **Edit Document**. The **Document Summary** tab displays.

4. Make the necessary adjustments and click **Close**

**Document** to exit the document without stamping, or stamp the document from the **Confirmation** tab.

## Stamp Documents

Note that agency policy may require that the document be viewed prior to stamping.

1. Select the document(s) for approval in the **Select** column.



2. Click **Pre-Audit & Stamp Selected Document(s)**. The system displays the **Pre-Audit Results** page. View the pre-audits and review traveler justifications for any audits with a status of **FAIL**.

3. Click **Continue Stamping Document(s)**. The system displays the **Document Stamping** window.
4. Enter any comments you have regarding the document in the **Remarks** field.

5. Either stamp the document with the **[AWAITED STATUS]** if you want to continue routing or with **RETURNED** (configurable by agency) if you need to return the document to the traveler for changes.

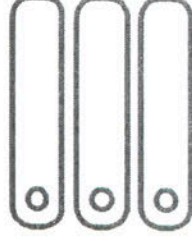
## Search Previous Approvals

1. From the **Approvals** page, select **Search Previous Approvals** from the secondary navigation.

2. In the **Search Criteria** area, select the appropriate search options. **Restrict to Complete Documents** will only return results that have gone through the entire routing list and been fully approved.

3. After you select your search criteria, click **Refresh Document List**.

4. When you select the **Document Name**, you have the option to **Review Document** or **Preview Document**.





## Sign in to ConcurGov

1. Enter your **User Name** and **Password** in the corresponding fields.
2. Click **Sign In**.

*If you are not sure how to sign in to ConcurGov, contact your Administrator.*

## Acting as other user

When your profile is configured to arrange travel for others, the **Profile** tab will have a sub-section titled **Acting as other user**.

- The **Act on behalf of another user** radio button will allow you to access a drop-down menu of users that you have previously searched for and accessed.
- The **Book travel for any user** radio button will allow you to search for any user that you have access to by entering the user's name or email address into the search field.
- The third radio button, **All users to whom I have access** will allow you to view information regarding every user that you have access to (this feature can be helpful when looking through authorizations and vouchers).  
Once a selection has been made within one of the three radio buttons, you must select **Start Session**. If you have selected a specific user through either of the first two radio buttons, the **Profile** tab will then display **Acting as (user's name)**.

Once you select a traveler, you can proceed with booking reservations for that traveler using the same guidelines and procedures used by a federal traveler.

When you are finished booking travel or working with documents for the user, be sure to open the **Profile** tab and select **Done acting for others** to revert to your own account.

## Adding travelers you assist

1. Click the **Profile** tab and select **Profile Settings**.
2. In the **Other Settings** section on the left side of the screen, select **I'm Assisting...**
3. To add a new user, type their name into the **Username** field, select the **Can book travel?** checkbox if applicable, and select **Add/Update**.

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## Voucher

A voucher is an official claim document for reimbursement.

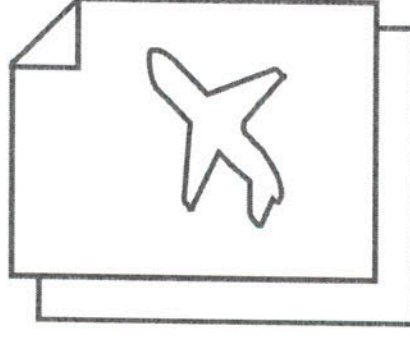
To create a voucher:

1. Select **Vouchers** from the primary navigation and then **New Voucher** from the secondary navigation.
2. Select the appropriate **Document Type**, this is typically *Voucher from Authorization*.
3. Click **Create Document**.
4. Select the authorization you would like to use by clicking the **Edit** icon.
5. Verify that the **Document Information** is correct, and then click **Create Document**.
6. All of the information from the authorization is carried over into the voucher. Verify that the information is correct, and make any necessary changes before submitting the document for reimbursement.
7. To add, edit, or delete expenses or receipts, click the **Expenses & Receipts** tab.
8. View the total cost of your trip on the **Totals** tab.
9. Click the **Confirmation** tab. From the **Status to Apply** dropdown menu, verify the status stamp is correct.
10. Click **Stamp and Submit Document**.
11. Review the **Pre-Audit Results** page. If there are any **FAILs**, click **Justify Pre-Audit Results** to provide a justification. **Save** your justifications, and then click **Continue Stamping the Document**.
12. If applicable, read the statement and click **Accept Signature Text**.
13. Click **Close Post Stamping Document Closure Screen**.

*The traveler will receive an email that their voucher is ready to be signed.*



# CONCURGOV



# Federal Travel Arranger Quick Reference Guide

Revised: April 18, 2016

*Note: ConcurGov is configurable by your agency and may provide additional or less options than presented in this guide.*



## Travel

### Review your agency's travel policy

In the footer of every page is a link to the relevant travel policy information for your agency. Review this before you book reservations for the first time.

### Book a flight

1. Click the **Travel** tab.
2. In the **Travel Authorizations** box, select the **New Authorization from Travel** radio button.
3. On the **Air/Rail** tab and select the applicable trip option: **Round Trip, One Way, or Multi-City**
4. In the **Temporary Duty Location** section, search by **Agency Location** or **Reference Point**.
5. Select your **TDY Per Diem Location**.
6. Adjust **From** and **To** airports as necessary.
7. Select the **Outbound** and **Return** dates and times.
8. Select the **Pick-up/Drop-off car at airport** checkbox if necessary.
9. Select the **Find a Hotel** checkbox if necessary.
10. Click **Search**.
11. Flights are color-coded by policy. The **Reserve** button can be green, meaning in policy, yellow or red, meaning out of policy, or gray, meaning it cannot be selected.
12. View the flight details by clicking the **View fares** button or **Flight details**.
13. To select a seat, click the **Seat Map** icon, choose an available seat, click **Select Seat** and click **Close**.
14. Select a **Frequent Flyer Program** if applicable.
15. Click **Select**.
16. Review the reservation details on the **Review and Reserve Flight** screen and click **Reserve Flight and Continue**.

### Select a car

If you selected **Pick-up/Drop-off car at airport** on the **Air/Rail** tab, the system displays the car search results after you select your flight. To reserve a car without airfare:

1. On the **Travel** page, click the **Car** tab.
2. Enter the necessary information for your car search.
3. Click **Search**.
4. Find the appropriate rental car, and then click **Select**.
5. Review the reservation details on the **Review and Reserve Car** screen and click **Reserve Car and Continue**.

*Note: The **E-receipt Enabled** link displays next to some car rental agencies. This link displays if you have activated e-receipts in your profile.*

### Select a hotel

If you selected the **Find a Hotel** option on the **Air/Rail** tab, the system displays hotel search results after you choose your rental car.

To reserve a hotel without airfare:

1. On the **Travel** page, click the **Hotel** tab.
2. Enter the necessary information for your hotel search.
3. Click **Search**.
4. Click **Choose Room** to see specific room rates offered by a specific hotel.
5. Select the radio button next to the desired room and click **Select**.
6. Review the reservation details on the **Review and Reserve Hotel** screen, agree to the **Rate Details and Cancellation Policy** and click **Reserve Hotel and Continue**.

### Authorization

ConcurGov automatically creates an authorization once you confirm a booking.

- The **Summary** tab displays an overview of all the information in the authorization.
- On the **General** tab, fill out all required fields (marked by the red icons) and select **Save Changes**. You can view per diem location information on the **Trip Information** tab.
- Add, edit, and delete expenses on the **Expenses** tab, as well as attach any documents or receipts.

Your reservations and per diem expenses will be automatically included. You can do the following:

- Add expenses using the **Add Expense** button.
- Click **Save** to save any changes.
- Delete expenses by selecting the checkbox next to the appropriate expenses and selecting **Delete**.

- Edit expenses using the **Edit** icon.
- To add accounting codes, select the **Accounting** tab. Select an accounting code on the top half of the screen to add it to your document. If there are no accounting codes listed, click **Add New Accounting**.
- If allowed by your agency, select the **Advances** tab to request an advance.
- View the total cost of your trip on the **Totals** tab.

### Submit your authorization

To submit your authorization.

1. Select the **Confirmation** tab. From the **Status to Apply** dropdown menu, verify the status stamp is correct.
2. Click **Stamp and Submit Document**.
3. Review the **Pre-Audit Results** page. If there are any **FALLs**, click **Justify Pre-Audit Results** to provide a justification. Save your justifications and click **Continue Stamping the Document**.
4. Click **Close Post Stamping Document Closure Screen**.

### Cancel/Change a reservation.

Your agency can require that you contact a travel agency to make changes to airfare after ticketing. However, many travelers are able to make pre-ticketing changes. Be aware that changing a reservation may generate a fee.

1. Navigate to the **Trip Library** from the **Travel** tab.
  2. Click the name of the trip. On the itinerary, click the appropriate link to add or modify a reservation or cancel a reservation.
  3. To cancel your entire trip, click **Cancel Trip**.
- Note: you may need to resubmit your authorization, depending on the changes made.

See the back of this guide for *Voucher information*.



## Sign in to ConcurGov

1. Enter your **User Name** and **Password**.
2. Click **Sign In**.

*If you are not sure how to sign in to ConcurGov, contact your Administrator.*

## Homepage

- Use the **Shortcuts** section to:
  - Create or change a reservation
  - Create, view, or search through authorizations
  - Create an authorization from an agent booked trip
  - Create, view, or search through vouchers
  - Manage charge card transactions
  - Approve documents and view previous approvals
- The **Alerts** section shows any important expiration notices.
- The **Important Information** section shows information provided by your agency.
- The **Recent Trips** section lists up to five of your most recently created reservations. Click the **Trip Name** to view that itinerary, and click **Cancel Trip** to cancel a reservation.
- The **Recent Authorizations** section lists up to five of your most recent authorizations. In this section you can:
  - View or edit an authorization, or to view the associated vouchers and itineraries.
  - View all current and past authorizations.
  - Create an authorization.
- The **Recent Vouchers** section lists up to five of your most recent vouchers. In this section you can:
  - View or edit a voucher, or to view the associated authorization and itineraries.
  - View current and past authorizations.
  - Create an authorization.
- The **Documents Awaiting Action** section lists all documents that you need to stamp, including documents you need to approve.

## Voucher

A voucher is an official claim document for reimbursement.

To create a voucher:

1. Select **Vouchers** from the primary navigation and then **New Voucher** from the secondary navigation.
2. Select the appropriate **Document Type**, this is typically *Voucher from Authorization*.
3. Click **Create Document**.
4. Select the authorization you would like to use by clicking the **Edit** icon.
5. Verify that the **Document Information** is correct, and then click **Create Document**.
6. All of the information from the authorization is carried over into the voucher. Verify that the information is correct, and make any necessary changes before submitting the document for reimbursement.
7. To add, edit, or delete expenses or receipts, click the **Expenses & Receipts** tab.
8. View the total cost of your trip on the **Totals** tab.
9. Click the **Confirmation** tab. From the **Status** to **Apply** dropdown menu, verify the status stamp is correct.
10. Click **Stamp and Submit Document**.
11. Review the **Pre-Audit Results** page. If there are any **FAILS**, click **Justify Pre-Audit Results** to provide a justification. **Save** your justifications, and then click **Continue Stamping the Document**.
12. If applicable, read the statement and click **Accept Signature Text**.
13. Click **Close Post Stamping Document Closure Screen**.



# CONCURGOV



## Federal Traveler

## Quick Reference Guide

Revised: April 18, 2016

*Note: ConcurGov is configurable by your agency and may provide additional or less options than presented in this guide.*



## Travel

### Review your agency's travel policy

In the footer of every page is a link to the relevant travel policy information for your agency. Review this before you book reservations for the first time.

### Book a flight

1. Click the **Travel** tab.
2. In the **Travel Authorizations** box, select the **New Authorization from Travel** radio button.
3. On the **Air/Rail** tab and select the applicable trip option: **Round Trip, One Way, or Multi-City**
4. In the **Temporary Duty Location** section, search by **Agency Location** or **Reference Point**.
5. Select your **TDY Per Diem Location**.
6. Adjust **From** and **To** airports as necessary.
7. Select the **Outbound** and **Return** dates and times.
8. Select the **Pick-up/Drop-off car at airport** checkbox if necessary.
9. Select the **Find a Hotel** checkbox if necessary.
10. Click **Search**.
11. Flights are color-coded by policy. The **Reserve** button can be green, meaning in policy, yellow or red, meaning out of policy, or gray, meaning it cannot be selected.
12. View the flight details by clicking the **View fares** button or **Flight details**.
13. To select a seat, click the **Seat Map** icon, choose an available seat, click **Select Seat** and click **Close**.
14. Select a **Frequent Flyer Program** if applicable.
15. Click **Select**.
16. Review the reservation details on the **Review and Reserve Flight** screen and click **Reserve Flight and Continue**.

### Select a car

If you selected **Pick-up/Drop-off car at airport** on the **Air/Rail** tab, the system displays the car search results after you select your flight.

To reserve a car without airfare:

1. On the **Travel** page, click the **Car** tab.
  2. Enter the necessary information for your car search.
  3. Click **Search**.
  4. Find the appropriate rental car, and then click **Select**.
  5. Review the reservation details on the **Review and Reserve Car** screen and click **Reserve Car and Continue**.
- Note: The E-receipt Enabled link displays next to some car rental agencies. This link displays if you have activated e-receipts in your profile.*

### Select a hotel

If you selected the **Find a Hotel** option on the **Air/Rail** tab, the system displays hotel search results after you choose your rental car.

To reserve a hotel without airfare:

1. On the **Travel** page, click the **Hotel** tab.
2. Enter the necessary information for your hotel search.
3. Click **Search**.
4. Click **Choose Room** to see specific room rates offered by a specific hotel.
5. Select the radio button next to the desired room and click **Select**.
6. Review the reservation details on the **Review and Reserve Hotel** screen, agree to the **Rate Details and Cancellation Policy** and click **Reserve Hotel and Continue**.

## Authorization

ConcurGov automatically creates an authorization once you confirm a booking.

- The **Summary** tab displays an overview of all the information in the authorization.
- On the **General** tab, fill out all required fields (marked by the red icons) and select **Save Changes**. You can view per diem location information on the **Trip Information** tab.
- Add, edit, and delete expenses on the **Expenses**

tab, as well as attach any documents or receipts. Your reservations and per diem expenses will be automatically included. You can do the following:

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- Click **Save** to save any changes.
- Delete expenses by selecting the checkbox next to the appropriate expenses and selecting **Delete**.
- Edit expenses using the **Edit** icon.
- To add accounting codes, select the **Accounting** tab. Select an accounting code on the top half of the screen to add it to your document. If there are no accounting codes listed, click **Add New Accounting**.
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1. Select the **Confirmation** tab. From the **Status to Apply** dropdown menu, verify the status stamp is correct.
2. Click **Stamp and Submit Document**.
3. Review the **Pre-Audit Results** page. If there are any **FAILS**, click **Justify Pre-Audit Results** to provide a justification. Save your justifications and click **Continue Stamping the Document**.
4. Click **Close Post Stamping Document Closure Screen**.

## Cancel/Change a reservation.

Your agency can require that you contact a travel agency to make changes to airfare after ticketing. However, many travelers are able to make pre-ticketing changes. Be aware that changing a reservation may generate a fee.

1. Navigate to the **Trip Library** from the **Travel** tab.
  2. Click the name of the trip. On the itinerary, click the appropriate link to add or modify a reservation or cancel a reservation.
  3. To cancel your entire trip, click **Cancel Trip**.
- Note: you may need to resubmit your authorization, depending on the changes made.
- See the back of this guide for *Voucher information*.

Washington DC, 20460

Phone 202-564-1784

Fax 202-565-3084

For additional information, please refer to the OC SharePoint site [OC SharePoint](#)



**From:** Wood, Nikki  
**Sent:** Friday, March 29, 2019 1:11 PM  
**To:** Atcherson, Aileen  
**Subject:** FW: Travel Related - Delegation of Authority: 1-17A (Domestic Travel), 1-17B - International Travel, 1-17C (Domestic & International Travel for the OIG)  
**Attachments:** CFO RedelegationAuthority1stClassDomestic-Internatl 030112.pdf

**Nikki Wood**

Office of the Controller - Policy and Training Branch  
1300 Pennsylvania Ave NW  
Washington DC, 20460  
Phone 202-564-1784  
Fax 202-565-3084

For additional information, please refer to the OC SharePoint site [OC SharePoint](#)

---

**From:** Wood, Nikki  
**Sent:** Monday, April 9, 2018 1:11 PM  
**To:** Wong, Lela <Wong.Lela@epa.gov>  
**Cc:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Brookshire, Malena <Brookshire.Malena@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>; Atcherson, Aileen <Atcherson.Aileen@epa.gov>; Bennett, Angela <Bennett.Angela@epa.gov>; Atcherson, Aileen <Atcherson.Aileen@epa.gov>; Jones, Anita <Jones.Anita@epa.gov>  
**Subject:** RE: Travel Related - Delegation of Authority: 1-17A (Domestic Travel), 1-17B - International Travel, 1-17C (Domestic & International Travel for the OIG)

Hi Lela,

My apologies, I misunderstood your request, thank you for the clarification. Attached is the redelegation for First-Class Travel (Domestic and International).

Thank you,  
Nikki

---

**From:** Wong, Lela  
**Sent:** Monday, April 9, 2018 12:53 PM  
**To:** Wood, Nikki <Wood.Nikki@epa.gov>  
**Cc:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Brookshire, Malena <Brookshire.Malena@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>; Atcherson, Aileen <Atcherson.Aileen@epa.gov>; Bennett, Angela <Bennett.Angela@epa.gov>  
**Subject:** RE: Travel Related - Delegation of Authority: 1-17A (Domestic Travel), 1-17B - International Travel, 1-17C (Domestic & International Travel for the OIG)

Hi Nikki,

Yes, section 4.e says "The Chief Financial Officer and Deputy Chief Financial Officer **may redelegate** to the Director, Office of the Controller....". My understanding is "may redelegate" does not mean delegate. The beginning of section 4 says "Redelegation requires written documentation maintained in the delegation file...". That's what I am looking for – the redelegation document.

Thanks!

Lela

---

**From:** Wood, Nikki

**Sent:** Monday, April 09, 2018 9:22 AM

**To:** Wong, Lela <Wong.Lela@epa.gov>

**Cc:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Brookshire, Malena <Brookshire.Malena@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>; Atcherson, Aileen <Atcherson.Aileen@epa.gov>

**Subject:** RE: Travel Related - Delegation of Authority: 1-17A (Domestic Travel), 1-17B - International Travel, 1-17C (Domestic & International Travel for the OIG)

Hi Lela,

The delegation (1-17a) separates other than coach-class accommodations into two categories: first-class (2.b.1) and business-class (2.b.2). Section 2.c states the Deputy Administrator must approve the CFO's first-class accommodations, and Section 2.d states the CFO must approve the Deputy CFO's first-class accommodations. All other first-class accommodation approvals fall under the original delegation in Section 2.b.1, which was redelegated to the Controller in Section 4.e.

**2.b.1**

*"Approve other than coach-class, first-class, accommodations for Agency employees under the criteria provided in the Federal Travel Regulation and Agency travel policy.*

**4.e**

*"The Chief Financial Officer and Deputy Chief Financial Officer may redelegate to the Director, Office of the Controller the authority to approve other than coach-class, first-class, accommodations, including after-the-fact or post-travel waivers, for Agency employees under the criteria provided in the Federal Travel Regulation and Agency travel policy. Further delegation is not permitted."*

I hope this helps, and thank you.

Nikki

---

**From:** Wong, Lela

**Sent:** Friday, April 6, 2018 12:12 AM

**To:** Wood, Nikki <Wood.Nikki@epa.gov>

**Cc:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Brookshire, Malena <Brookshire.Malena@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>; Atcherson, Aileen <Atcherson.Aileen@epa.gov>

**Subject:** RE: Travel Related - Delegation of Authority: 1-17A (Domestic Travel), 1-17B - International Travel, 1-17C (Domestic & International Travel for the OIG)

Hi Nikki,

I have Delegation Authority 1-17A. According to the delegation, the CFO and Deputy CFO have the authority to approve the Administrator's use of premium class accommodations. This authority can be redelegated to the Controller. I am looking for the document for the redelegation to the Controller level if there is one.



Thanks!

Lela

**From:** Wood, Nikki

**Sent:** Thursday, April 05, 2018 1:37 PM

**To:** Wong, Lela <Wong.Lela@epa.gov>

**Cc:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Brookshire, Malena <Brookshire.Malena@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>; Atcherson, Aileen <Atcherson.Aileen@epa.gov>

**Subject:** Travel Related - Delegation of Authority: 1-17A (Domestic Travel), 1-17B - International Travel, 1-17C (Domestic & International Travel for the OIG)

Good Afternoon,

Per Jeanne's request, below is a link to OHR's listing of Delegation of Authority (by chapter), where you will find the Delegation of Authority 1-17A for Domestic Travel, Delegation of Authority 1-17B for International Travel, and Delegation Authority 1-17C for the OIG's Domestic and International Travel.

<http://intranet.epa.gov/ohr/rmpolicy/ads/dm/index1.htm>

Thank you,  
Nikki

**Nikki Wood**

Office of the Controller - Policy and Training Branch

1300 Pennsylvania Ave NW

Washington DC, 20460

Phone 202-564-1784

Fax 202-565-3084

For additional information, please refer to the OC SharePoint site OC SharePoint



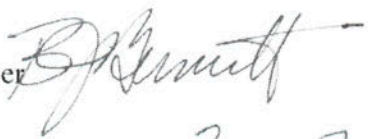
UNITED STATES ENVIRONMENTAL PROTECTION AGENCY  
WASHINGTON, D.C. 20460


MAR 1 - 2012

OFFICE OF  
CHIEF FINANCIAL OFFICER

**MEMORANDUM**

**SUBJECT:** Redlegation of Authority to Approve Other than Coach-Class (First-Class) Accommodations for Official Travel

**FROM:** Barbara J. Bennett  
Chief Financial Officer 

**THRU:** Maryann Froehlich  
Deputy Chief Financial Officer 

**TO:** Stefan Silzer, Director  
Office of Financial Management

**PURPOSE**

This memorandum redelegates the authority to approve other than coach-class (first-class) accommodations for official travel.

**BACKGROUND**

Delegation 1-17-A, Domestic Travel, dated September 13, 2011, Section 4.e., states the Chief Financial Officer and the Deputy Chief Financial Officer may redelegate to the Director, Office of Financial Management the authority to approve other than coach-class (first-class) accommodations, including after-the-fact or post-travel waivers, for agency employees under the criteria provided in the Federal Travel Regulation and agency travel policy. *Further re delegation is not permitted.*

Delegation 1-17-B, International (Foreign and Invitational-Foreign) Travel, dated September 13, 2011, Section 4.h., states the Chief Financial Officer and the Deputy Chief Financial Officer may redelegate to the position of the Director, Office of Financial Management the authority to approve other than coach-class (first-class) accommodations, for agency employees under the criteria provided in the Federal Travel Regulation and agency travel policy. *Further re delegation is not permitted.*

The EPA's travel delegations are available at <http://intranet.epa.gov/ohr/rmpolicy/ads/dm/index1.htm>.



## REDELEGATIONS

1. Domestic Travel - Effective immediately, the CFO and the DCFO redelegate to the Director, OFM the authority to approve other than coach-class (first-class) accommodations, including after-the-fact or post-travel waivers, for agency employees under the criteria provided in the FTR and agency travel policy. *Further redelegation is not permitted.*
2. International Travel – Effective immediately, the CFO and the DCFO redelegate to the Director, OFM the authority to approve other than coach-class (first-class) accommodations, for agency employees under the criteria provided in the Federal Travel Regulation and agency travel policy. *Further redelegation is not permitted.*

## LIMITATIONS

For both domestic and international travel, the Director, OFM will approve other than coach-class (first-class) accommodations for the agency's office directors or equivalent and employees below the position of office director.

As a matter of agency policy and ethical considerations, the Director, OFM must not authorize or approve his or her own domestic or international travel. The CFO, DCFO or designee will approve all travel for the Director, OFM.

cc: OCFO Senior Managers

**From:** Wood, Nikki  
**Sent:** Friday, March 29, 2019 1:12 PM  
**To:** Atcherson, Aileen  
**Subject:** FW: First/Business class exception

**Nikki Wood**

Office of the Controller - Policy and Training Branch  
1300 Pennsylvania Ave NW  
Washington DC, 20460  
Phone 202-564-1784  
Fax 202-565-3084

For additional information, please refer to the OC SharePoint site [OC SharePoint](#)

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**From:** Wood, Nikki  
**Sent:** Monday, May 21, 2018 11:43 AM  
**To:** Wong, Lela <Wong.Lela@epa.gov>; Conklin, Jeanne <Conklin.Jeanne@epa.gov>  
**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Trefry, John <Trefry.John@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>; Atcherson, Aileen <Atcherson.Aileen@epa.gov>; Bundy-Evans, Kyana <Bundy-Evans.Kyana@epa.gov>  
**Subject:** RE: First/Business class exception

Hi Lela,

Your interpretation of the old RMDS language is correct. In regards to the trip-by-trip process for first or business-class accommodations, [RMDS 2550B](#) discusses the process for approving first/business-class accommodations on a trip-by-trip basis on pages 33-34. In summary, the travel policy states that first/business-class accommodations must be approved on a trip-by-trip basis, as long as the request meets one or more of the exceptions stated in FTR §301-10.123. The policy also provides a table showing the Approver/Authorizer for each class of transportation.

Thank you,  
Nikki

---

**From:** Wong, Lela  
**Sent:** Wednesday, May 16, 2018 6:16 PM  
**To:** Wood, Nikki <Wood.Nikki@epa.gov>; Conklin, Jeanne <Conklin.Jeanne@epa.gov>  
**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Trefry, John <Trefry.John@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>  
**Subject:** RE: First/Business class exception

Thanks Nikki. So under the old RMDS, EPA would not pay the fee to upgrade to "coach elite", "coach plus", etc., but the new RMDS will allow it if it is in the interest of the government?



Sounds like Jeanne said there was also a process for trip-by-trip approval under the old policy for the first class and business class accommodations. Was she referring to the RMDS section attached? If not, can you please send me the process Jeanne mentioned below?

Thanks for your help!

Lela

---

**From:** Wood, Nikki

**Sent:** Wednesday, May 16, 2018 8:32 AM

**To:** Wong, Lela <Wong.Lela@epa.gov>; Conklin, Jeanne <Conklin.Jeanne@epa.gov>

**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Trefry, John <Trefry.John@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>

**Subject:** RE: First/Business class exception

Hi Lela,

Below is language from the updated travel policy (RMDS 2550B – Official Travel) on the use of the Coach-Class Seating Upgrade Program.

### ***Coach-Class Seating Upgrade Programs***

***Federal Travel Regulation 301-10.124*** allows coach-class seating upgrade, identified as “Coach Elite,” “Coach Plus” or “Preferred Coach”. Under these programs, a passenger may obtain for a fee a more desirable seat choice within the coach-class cabin. These coach-class upgrade options are not considered a new or higher class of accommodation since the seating is still in the coach cabin.

*The use of the Coach-Class Seating Upgrade requires approval (including written justification in the agency travel system) by an authorizing official on a trip-by-trip basis as identified in the **Executive Approval Framework (Appendix P)**. An agency may authorize and reimburse the additional seat choice fee when it is determined that doing so is in the interest of the Government. Prudent diligence must be used to ensure appropriate financial stewardship practices are being adhered to.*

Thank you,  
Nikki

---

**From:** Wong, Lela

**Sent:** Wednesday, May 16, 2018 11:10 AM

**To:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Wood, Nikki <Wood.Nikki@epa.gov>

**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Trefry, John <Trefry.John@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>; Wood, Nikki <Wood.Nikki@epa.gov>

**Subject:** RE: First/Business class exception

Hi Nikki,

Can you please send me the processes Jeanne mentioned in her email below at your earliest convenience?

Thanks!

Lela

---

**From:** Conklin, Jeanne

**Sent:** Wednesday, May 09, 2018 3:59 PM

**To:** Wong, Lela <Wong.Lela@epa.gov>

**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Trefry, John <Trefry.John@epa.gov>; Jones-Peeler, Meshell <Jones-

[Peeler.Meshell@epa.gov](mailto:Peeler.Meshell@epa.gov); Wood, Nikki <[Wood.Nikki@epa.gov](mailto:Wood.Nikki@epa.gov)>

**Subject:** Re: First/Business class exception

We have a trip by trip wavier process for first and business class. Then for coach plus we have a new process. Nicki will send you the processes.

Jeanne Conklin  
Controller, Office of the Controller  
OCFO  
202-564-5342

On May 9, 2018, at 3:43 PM, Wong, Lela <[Wong.Lela@epa.gov](mailto:Wong.Lela@epa.gov)> wrote:

Thanks Jeanne. Just want to make sure I understand you correctly. So the June 2017 waiver was open ended, but you have rescinded it?

Thanks!

Lela

---

**From:** Conklin, Jeanne

**Sent:** Wednesday, May 09, 2018 3:42 PM

**To:** Wong, Lela <[Wong.Lela@epa.gov](mailto:Wong.Lela@epa.gov)>

**Cc:** Bennett, Angela <[Bennett.Angela@epa.gov](mailto:Bennett.Angela@epa.gov)>; Trefry, John <[Trefry.John@epa.gov](mailto:Trefry.John@epa.gov)>; Jones-Peeler, Meshell <[Jones-Peeler.Meshell@epa.gov](mailto:Jones-Peeler.Meshell@epa.gov)>; Wood, Nikki <[Wood.Nikki@epa.gov](mailto:Wood.Nikki@epa.gov)>

**Subject:** Re: First/Business class exception

Sure thing you are correct. Meshell will have Nicki send the new process.

Jeanne Conklin  
Controller, Office of the Controller  
OCFO  
202-564-5342

On May 9, 2018, at 3:18 PM, Wong, Lela <[Wong.Lela@epa.gov](mailto:Wong.Lela@epa.gov)> wrote:

Hi Jeanne,

John, Angela & I had a discussion about the waiver today. We are not clear on how long the waiver is supposed to be good for. Was it intended to be open ended? We were told that the Administrator had decided to stop using first/business class, and you mentioned something about another accommodation (sounds like slightly above coach, but below business class), what is that accommodation? Does that mean you have rescinded the June 2017 first/business class waiver and approved this other accommodation instead? Can you please give us an update on the current situation? e.g. what kind of approval is needed for the current accommodation (slightly above coach)? Who does the approval? Is this other approval open ended, good for a period of time, or one a trip-by-trip basis?

Thanks!

Lela



Non-responsive header

**From:** Nelson, Khary  
**Sent:** Friday, March 29, 2019 1:13 PM  
**To:** Atcherson, Aileen  
**Subject:** FW: Air Carrier Code Share and Open Skies Agreement

---

**From:** Nelson, Khary  
**Sent:** Thursday, October 11, 2018 8:39 AM  
**To:** Wong, Lela <Wong.Lela@epa.gov>  
**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Trefry, John <Trefry.John@epa.gov>; Conklin, Jeanne <Conklin.Jeanne@epa.gov>  
**Subject:** RE: Air Carrier Code Share and Open Skies Agreement

Lela,

See below.

---

**From:** Wong, Lela  
**Sent:** Wednesday, October 10, 2018 6:37 PM  
**To:** Nelson, Khary <nelson.khary@epa.gov>  
**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Trefry, John <Trefry.John@epa.gov>; Conklin, Jeanne <Conklin.Jeanne@epa.gov>  
**Subject:** RE: Air Carrier Code Share and Open Skies Agreement

Hi Khary,

Are you working this week? Would like to discuss my follow-up questions below. Email response works as well.

Thanks!

Lela

---

**From:** Wong, Lela  
**Sent:** Friday, October 05, 2018 9:06 AM  
**To:** Nelson, Khary <nelson.khary@epa.gov>  
**Cc:** Bennett, Angela <bennett.angela@epa.gov>; Trefry, John <trefry.john@epa.gov>; Conklin, Jeanne <Conklin.Jeanne@epa.gov>  
**Subject:** RE: Air Carrier Code Share and Open Skies Agreement

Hi Khary,

The 1<sup>st</sup> one on the list – Air France -- is a code share, but it does not need to show who the code shared US carrier is? No, the reservation module won't always show who the code share partner is.

The YCA fare means Air France had gone through the City Pair process to get the route accepted as a code share?

No, most likely the route was awarded to Delta as the American Flag Carrier and Delta is using Air France to fulfill a portion of the route as a code share.

How can we tell whether it's code share or Open Skies? By the fare code? Foreign-to-foreign? The examples in the FTR bulletin for Open Skies show US-foreign.

Yes, all of those things need to be considered. There isn't a short answer I can give you for this. It's a complex system of rules and exceptions, but neither Concur nor BCD would allow booking of a foreign flag carrier that did not meet one of the exceptions

Also, can you please provide me with a BCD contact? We may want to talk to them to get a better understanding of their controls to ensure Fly America compliance.

His name is Dan Lakatos and can be reached at (b) (6) I will tell him to expect your call.

Thanks!

Lela

Type	Status	Vendor/Carrier	Details	Confirmation Number	Start Date	End Date	Date Booked	Date Cancelled
Event	Active				04/12/2018 12:00 AM	04/12/2018 02:00 AM	11/30/2017 05:55 PM	
Air	Active	Air France	Flight 4081 - Washington Dulles Intl Airport (IAD) to Paris Charles de Gaulle Airport (CDG) - Economy class - Fare basis: YCA		12/09/2017 08:00 PM	12/09/2017 09:25 AM	12/09/2017 01:09 PM	
Air	Active	Delta	Flight 8695 - Paris Charles de Gaulle Airport (CDG) to Rabat Airport (RBA) - Economy class - Fare basis: YCA	GC3IP5	12/10/2017 10:25 AM	12/10/2017 12:15 PM	11/09/2017 04:44 PM	
Air	Active	Air France	Flight 1358 - Paris Charles de Gaulle Airport (CDG) to Rabat Airport (RBA) - Economy class - Fare basis: BN1H01M1		12/11/2017 08:00 PM	12/11/2017 09:50 PM	12/11/2017 04:33 PM	
Air	Active	Delta Operated by TRANSAVIA AIRLINES	Flight 7516 - Marrakech Airport (RAK) to Amsterdam Airport (AMS) - Economy class - Fare basis: BN1H01M1	GC3IP5	12/13/2017 10:45 AM	12/13/2017 03:40 PM	11/30/2017 04:40 PM	

**From:** Nelson, Khary

**Sent:** Wednesday, October 03, 2018 6:14 AM

**To:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>

**Cc:** Wong, Lela <Wong.Lela@epa.gov>

**Subject:** RE: Air Carrier Code Share and Open Skies Agreement

The first 2 flights are YCA fare basis, meaning they are the city pair for that route. The Air France portion would qualify as code share.

The 3<sup>rd</sup> flight is foreign to foreign and would qualify for Open skies. The 4<sup>th</sup> flight is a US Flag carrier.



The short answer is, a good amount of knowledge of the codes would be needed to interpret this just from the display in the reservations. BCD travel as booking agent is ensuring that the rules are followed and would not allow flights that did not meet the Fly America Act or the Open Skies agreements to be booked.

Thanks,  
KJhary

---

**From:** Conklin, Jeanne  
**Sent:** Tuesday, October 02, 2018 7:06 PM  
**To:** Nelson, Khary <[nelson.khary@epa.gov](mailto:nelson.khary@epa.gov)>  
**Cc:** Wong, Lela <[Wong.Lela@epa.gov](mailto:Wong.Lela@epa.gov)>  
**Subject:** Fwd: Air Carrier Code Share and Open Skies Agreement

Please respond

Jeanne Conklin  
Controller, Office of the Controller  
OCFO  
202-564-5342

Begin forwarded message:

**From:** "Wong, Lela" <[Wong.Lela@epa.gov](mailto:Wong.Lela@epa.gov)>  
**Date:** October 2, 2018 at 6:42:24 PM EDT  
**To:** "Conklin, Jeanne" <[Conklin.Jeanne@epa.gov](mailto:Conklin.Jeanne@epa.gov)>  
**Cc:** "Bennett, Angela" <[Bennett.Angela@epa.gov](mailto:Bennett.Angela@epa.gov)>  
**Subject:** Air Carrier Code Share and Open Skies Agreement

Hi Jeanne,

When we met to discuss the Agency's response to our discussion documents a while back, we talked about the use of foreign carriers under the Open Skies Agreement and code shares. We want to make sure we understand how they are shown in the receipts/reservations. Using this itinerary as an example, the last one on the list "Delta Operated by Transavia" would be a code share between Delta & Tranavia. The Air France ones (1<sup>st</sup> and 3<sup>rd</sup> items) would fall under the Open Skies agreement. Is that correct?

Thanks!

Type	Status	Vendor/Carrier	Details	Confirmation Number	Start Date	End Date	Date Booked	Date Canceled
Event	Active				04/12/2018 12:00 AM	04/12/2018 02:00 AM	11/30/2017 05:55 PM	
Air	Active	Air France	Flight 4081 - Washington Dulles Intl Airport (IAD) to Paris Charles de Gaulle Airport (CDG) - Economy class - Fare basis: YCA		12/09/2017 08:00 PM	12/09/2017 09:25 AM	12/09/2017 01:09 PM	
Air	Active	Delta	Flight 8695 - Paris Charles de Gaulle Airport (CDG) to Rabat Airport (RBA) - Economy class - Fare basis: YCA	GC3IP5	12/10/2017 10:25 AM	12/10/2017 12:15 PM	11/09/2017 04:44 PM	
Air	Active	Air France	Flight 1358 - Paris Charles de Gaulle Airport (CDG) to Rabat Airport (RBA) - Economy class - Fare basis: BN1H01M1		12/11/2017 08:00 PM	12/11/2017 09:50 PM	12/11/2017 04:33 PM	
Air	Active	Delta Operated by TRANSAVIA AIRLINES	Flight 7516 - Marrakech Airport (RAK) to Amsterdam Airport (AMS) - Economy class - Fare basis: BN1H01M1	GC3IP5	12/13/2017 10:45 AM	12/13/2017 03:40 PM	11/30/2017 04:40 PM	



**From:** Nelson, Khary  
**Sent:** Friday, March 29, 2019 1:13 PM  
**To:** Atcherson, Aileen  
**Subject:** FW: Can you please take a look at this voucher? Thanks!

**From:** Nelson, Khary  
**Sent:** Monday, April 09, 2018 2:06 PM  
**To:** Wong, Lela <Wong.Lela@epa.gov>  
**Cc:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Bennett, Angela <Bennett.Angela@epa.gov>  
**Subject:** RE: Can you please take a look at this voucher? Thanks!

Lela,

The overpayment was found and collected in January.

Thanks,  
Khary

**Document Summary:** General Ledger Entries  
**Document:** CNR 1850T7A017  
**SFO:** CFC  
**Disbursing Office:** CFC  
**Document Date:** 01/31/18  
**Accomplished Date:** 01/30/18  
**Original Entry Date:** 01/31/18  
**Description:** LEXINGTON, KY  
**Amount:** \$112.00  
**Extended Description:** Trip to Lexington KY

**Document Details:**

Line	Charge Line Number	Record Type	Line Amt	Check No	BFY	Fund	RPIO	Org	Prog	Proj	FOC
1			\$112.00	0PAY.GOV	20172018	B	77	50EP	ZZZEF2	MN775000	2111

**Document Activity:**

Date	Ref Amount	Related Document	Direction	Date	Ref Amount	Related Document	Date	Ref Amount	Related
01/30/2018	-\$112.00	Decrease							

**From:** Wong, Lela  
**Sent:** Monday, April 09, 2018 11:52 AM  
**To:** Nelson, Khary <nelson.khary@epa.gov>

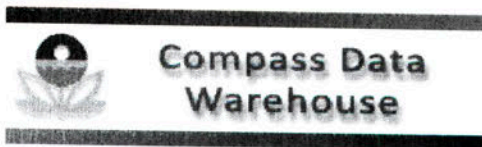
Cc: Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Bennett, Angela <Bennett.Angela@epa.gov>  
Subject: Can you please take a look at this voucher? Thanks!

Hi Khary,

Can you please take a look at this voucher? Looks like he was reimbursed for lodging costs in excess of 300% of per diem. I just checked CDW. He was paid the voucher amount. He was a Protective Services Detail agent for one of the Administrator's trips.

Thanks!

Lela



Save these conditions as report title:   (Note - you must be logged in to save)

Travel Obligations

TA Number starts with TAA054SP

Rec#	DCN Number	Traveler	Type	Begin	End	T
1	TO 1850T7A017	DASS, PAUL L	TDY	10/07/17	10/10/17	:
<b>Totals:</b>						:

Note - Line totals are based upon the conditions entered. Yellow background indicates line subtotal differs from document



**From:** Nelson, Khary  
**Sent:** Friday, March 29, 2019 1:13 PM  
**To:** Atcherson, Aileen  
**Subject:** FW: Can you please take a look at this voucher? Thanks!

**From:** Nelson, Khary  
**Sent:** Monday, April 09, 2018 2:06 PM  
**To:** Wong, Lela <Wong.Lela@epa.gov>  
**Cc:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>; Bennett, Angela <Bennett.Angela@epa.gov>  
**Subject:** RE: Can you please take a look at this voucher? Thanks!

Lela,

The overpayment was found and collected in January.

Thanks,  
Khary

**Document Summary:** General Ledger Entries  
**Document:** CNR 1850T7A017  
**SFO:** CFC  
**Disbursing Office:** CFC  
**Document Date:** 01/31/18  
**Accomplished Date:** 01/30/18  
**Original Entry Date:** 01/31/18  
**Description:** LEXINGTON, KY  
**Amount:** \$112.00  
**Extended Description:** Trip to Lexington KY

**Document Details:**

Line	Charge Line Number	Record Type	Line Amt	Check No	BFY	Fund	RPIO	Org	Prog	Proj	FOC
1			\$112.00	0PAY.GOV	20172018	B	77	50EP	ZZZEF2	MN775000	2111

**Document Activity:**

Date	Ref Amount	Related Document	Direction	Date	Ref Amount	Related Document	Date	Ref Amount	Related
01/30/2018	-\$112.00	Decrease							

**From:** Wong, Lela  
**Sent:** Monday, April 09, 2018 11:52 AM  
**To:** Nelson, Khary <nelson.khary@epa.gov>

**From:** Nelson, Khary  
**Sent:** Friday, March 29, 2019 1:13 PM  
**To:** Atcherson, Aileen  
**Subject:** FW: Administrator's lodging in excess of 150% of per diem  
**Attachments:** 27C1810E0001.pdf

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**From:** Nelson, Khary  
**Sent:** Tuesday, September 04, 2018 10:45 AM  
**To:** Wong, Lela <Wong.Lela@epa.gov>; Conklin, Jeanne <Conklin.Jeanne@epa.gov>  
**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Luebbering, Gregory <luebbering.gregory@epa.gov>  
**Subject:** RE: Administrator's lodging in excess of 150% of per diem

As requested.

Thanks

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**From:** Wong, Lela  
**Sent:** Thursday, August 30, 2018 12:37 PM  
**To:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>  
**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Luebbering, Gregory <luebbering.gregory@epa.gov>; Nelson, Khary <nelson.khary@epa.gov>  
**Subject:** RE: Administrator's lodging in excess of 150% of per diem

Thanks Jeanne. Sorry for the late response. I was out for a few days.

If you can email us a copy of the bills once they are issued, that would be great.  
Thanks!  
Lela

---

**From:** Conklin, Jeanne  
**Sent:** Monday, August 27, 2018 10:21 AM  
**To:** Wong, Lela <Wong.Lela@epa.gov>  
**Cc:** Bennett, Angela <Bennett.Angela@epa.gov>; Luebbering, Gregory <luebbering.gregory@epa.gov>; Nelson, Khary <nelson.khary@epa.gov>  
**Subject:** Re: Administrator's lodging in excess of 150% of per diem

We did not get any additional documentation so we are preparing the bills now.

Jeanne Conklin  
Controller, Office of the Controller  
OCFO  
202-564-5342

On Aug 25, 2018, at 1:16 AM, Wong, Lela <Wong.Lela@epa.gov> wrote:

Hi Jeanne,



Any update on the repayment highlighted below? We did receive justification for July 17-20 as part of the 6/15/2018 package from Helena, so that leaves 3 nights without justification.

Thanks!

Lela

**From:** Nelson, Khary

**Sent:** Wednesday, May 02, 2018 10:58 AM

**To:** Conklin, Jeanne <Conklin.Jeanne@epa.gov>

**Cc:** Luebbering, Gregory <luebbering.gregory@epa.gov>; Trent, Bobbie <Trent.Bobbie@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>

**Subject:** RE: Administrator's lodging in excess of 150% of per diem

No, for the 4 trips (6 lodging nights), the approval memos were not provided and the AOs office cannot produce them. We have informed them that the administrator will need to repay the amount over 150% (grand total \$299) if the memos can't be provided.

Khary

**From:** Conklin, Jeanne

**Sent:** Wednesday, May 02, 2018 10:48 AM

**To:** Nelson, Khary <nelson.khary@epa.gov>

**Cc:** Luebbering, Gregory <luebbering.gregory@epa.gov>; Trent, Bobbie <Trent.Bobbie@epa.gov>; Jones-Peeler, Meshell <Jones-Peeler.Meshell@epa.gov>

**Subject:** RE: Administrator's lodging in excess of 150% of per diem

Were you able to provide this?

*Jeanne*

Jeanne Conklin, CGFM, CGMS

Controller

Office of the Controller

Office of the Chief Financial Officer

U.S. ENVIRONMENTAL PROTECTION AGENCY

1200 Pennsylvania Avenue, N.W.

Washington, D.C. 20460

(202) 564-5342 (o) (b) (6) cell

<image002.png>

**From:** Conklin, Jeanne

**Sent:** Monday, April 30, 2018 7:19 PM

**To:** Nelson, Khary <nelson.khary@epa.gov>

**Subject:** Fwd: Administrator's lodging in excess of 150% of per diem

Are the missing documents available?

Jeanne Conklin

Controller, Office of the Controller

OCFO

202-564-5342

Begin forwarded message:

**From:** "Wong, Lela" <[Wong.Lela@epa.gov](mailto:Wong.Lela@epa.gov)>  
**Date:** April 30, 2018 at 7:04:10 PM EDT  
**To:** "Conklin, Jeanne" <[Conklin.Jeanne@epa.gov](mailto:Conklin.Jeanne@epa.gov)>  
**Cc:** "Trefry, John" <[Trefry.John@epa.gov](mailto:Trefry.John@epa.gov)>, "Bennett, Angela" <[Bennett.Angela@epa.gov](mailto:Bennett.Angela@epa.gov)>  
**Subject:** Administrator's lodging in excess of 150% of per diem

Hi Jeanne,

Here are the lodging in excess of 150% of per diem. The last column explains what's missing. Thanks!

<image004.jpg>



