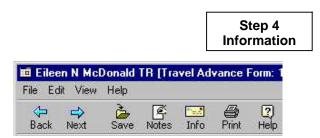


Approve Travel Advance



Approvers will receive e-mail indicating that they have a form to approve. From the CalATERS web site at www.calaters.ca.gov, CalATERS click



At any point during the review of a Travel Advance form, you may exit and save changes to the form. Click File, Close.



Click Yes to save changes.

CalATERS sign in User D: Password: Sign In	-
Password:	
1 - Constantin Estation (* 8	
Sign In	
new user ? New User Registration	

Key User ID and Password.



Displays the Travel Advance delivery option and date needed indicated by the employee. 2. Travel Advance

Click tab

					1	to so tatus		Step 3	
Debie 0 0.		Help							- IOI >
New Open	Piet	Rafus	Profile	Help		•		View: Al	*
Created	0 8				larte	A Status	Owner	Type	1 2
11.04.02	8:	03/2	002 Trans	t Subsid	onterence Request	Action	Eleen O McDonald Eleen O McDonald	Expense Reinburg Travel Advance Fo	
11.04.02	M				ervisor's Training	Submitted	Debie O Oak	Expense Reinburb	

From the work queue, open (double click on) a Travel Advance form that has a status of Action.

Step 5		Step 6
	Elicen O McDonald [Travel Advance Funk: 11/25-26/2002 Napa Conference Begue File: Edit, Vev. Help	
RS Travel Advance	Contraction Participation Print Help	CalATERS Travel Advance
	1. Check Delivery Option 2. Travel Advance 3. Completion Travel Advance Information	
	There Advance Top() Information Call Type (In State Tores Call Type (In State Call Ty	Exceptions to policies.
	Centernation Gillage Answell 150.00 Total Travel Advance Answell 150.00 Total Travel Advance Answell	nount field.
	In State Travel Attend budget conference 11/25/02 11/25/02	150.00 Nepa

exceptions to department policies.

Displays requested Travel Advance(s). The Amount field can be lowered. The button (bottom right on screen) displays



Approve Travel Advance

Step 7 Information

If reducing the amount requested, add a note

e log for Co	omments			
Name:	Debie O Oak			Update
Subject:	Travel Advan		Delete	
Comment:		ount requested from \$150 to ee is pre-paid.	\$100, <u>–</u>	Finished
Name	20 C	Subject	Comment	

Key reason in **Comments** and click **Update**, click **Finished**.

Click tab 3. Completion

e Edit View		ance Foon: 11725-2672002 Napa Conference	• Request Step 10
Pack Next	Save Notes Info	Den Port Holp	CalATERS Travel Advance
1. Check Delivery	Option 2. Travel	Advance 1. Completion	
Form Completi	on		
Review tions	Summary	Approve / Return	
To Appr	ove / Return		
_			Add Approver
	willing that		
Lhereby c			
I hereby e	21.1 5 0 ANS A		
1) Lans aut	horized by my depu	artment to approve travel advance requests;	
1) Lans aut	horized by my depu	artment to approve travel advance requests; rized and will be used for official State busin	

This screen is used to approve, return or disapprove a Travel Advance. It can also be used to add an additional approver. To add an approver click Add Approver and Look Up approver's last name. Click **Ok** to add approver.

dren D McDonald [Travel Advance Form: 11/25/26/2002 Napa Conference P Ed: View Help	Step 8
a 😅 🍰 💽 🔤 🤀 🕡 Cá Niest Save Notes Info	CalATERS Travel Advance
Check Delivery Option 2. Travel Advance 3. Completion min Completion eview Rems Support Approve (Return	
Eileen O McDonald Total Advances 150.00 Report Name: 1105-362002 Napa Contenence Request	
Imm Connect Jim Advancement For special data is 4 dramor several way by the Part Cate Jim 20 December and Travel advance amount should not be greater from 0.00. Provid PAID Excession amount Travel advance amount should not be greater from 0.00. Provid	
#10b Advance date. TA request date is 14 or more coloridar days before Start Date	(21) Provide reason Complete

The **Review Items** screen displays any exceptions to department polices. Click the **Summary** tab.

	Edit View Help ack Next Save R Oteck Delivery Option	Notes trifo Puet Help	mpletion		CalA1	TERS Travel A
Test Travit Advance Annual Reparted 1000 Chard Dairwy Option Statet 4 Paid up Test Travit Advance Travit Names Test Advance Travit Names Test Advance Travit Names Test Advance Travit Names Test Travit Test Advance Travit Names Test Advance Travit Names Test Advance Travit Names Own Trave Test Advance Travit Names Test Advance Travit Names Test Advance Travit Names	oran Completion Review tons Serve	mary Approve / Return	í.			
Class Type Purpose Start Date End Date Amount Destination		w 1				
Class Type Purpose Start Date End Date Amount Destination		Advance Amount Requested	\$150.00 Check	Delayery Option 2	elected Pickup	
Class Type Purpose Start Date End Date Amount Destination		Advance Amount Requested	\$1.20.00 Cherd	Delayery Option 3	elected Pickup	
Class Type Purpose Start Date End Date Amount Destination		Advance Amount Requested	\$1:0.00 Ched	: Delayery Option 3	elected Pickup	
n bale invert a serve budge commerce. I Transvis 1112.507 112.507		A drance Amount Requested				
	Total Travel a	Purpose	Travel Adv Start Date	ince Top(s) Turning End Date	7 Acout	

The **Summary** screen displays information from tab 1. Check Delivery Options and tab

2. Travel Advance. Click Approve / Return tab.

Adjust Reaso	n	Step 12
🗶 Adju	st Reason	
1		

When an adjustment is made on tab **2.Travel Advance**, the **Adjust Reason** box will

display. Click the down arrow to display options, then select an option. If **Other** is selected, key a reason e.g., See Note Log.

CalATERS will generate an e-mail to the employee, notifying them of the adjustment.

At the Approve/Return screen, key Step 11 your password and click one of the following:

Approves advance and moves the form to the next approver or accounting.

Return for more information employee or previous approver for corrections or additional information. You must key a return reason. CalATERS sends an e-mail notifying the person that the form has been returned.

Disapproves and returns the form to the employee. CalATERS sends an e-mail notifying the employee of the disapproval. The employee cannot modify the form. The form becomes a permanent record.