

Information Paper:

Making Changes to DTS Documents

Summary

You* created a DTS document – say, an authorization or voucher – but now you have to change it. Maybe you need to update your travel plans or add a new expense cost estimate, or any number of other things. What do you do? This information paper explains the processes you must follow to open a DTS document to make changes.

**In this information paper, “you” refers to a traveler; however, the actions described also apply to anyone who creates documents for you, such as a Non-DTS Entry Agent or travel clerk.*

If ...	Follow the instructions for making ...
You created but never signed the document	an <i>edit</i> .
You signed the document, but it is not currently approved	an <i>adjustment</i> .
The AO approved the document at least once	an <i>amendment</i>

Getting Started

All changes begin the same way:

1. From the **DTS Dashboard**, the listing of documents displays. On this screen, select the document type (authorization, voucher, local voucher, or group authorization) you want to change*. A list of available documents (Figure 1) opens. **Note:** If the document you want to change does not initially appear on the list, select the **Show inactive documents** box (Figure 1a.) The example shows the starting point for changing an authorization, but other document types function essentially the same way. See individual sections for explanations of the indicator numbers.

NDEAs and travel clerks must select **Trips, then **Traveler Lookup** first, to find the traveler whose document requires changing.*

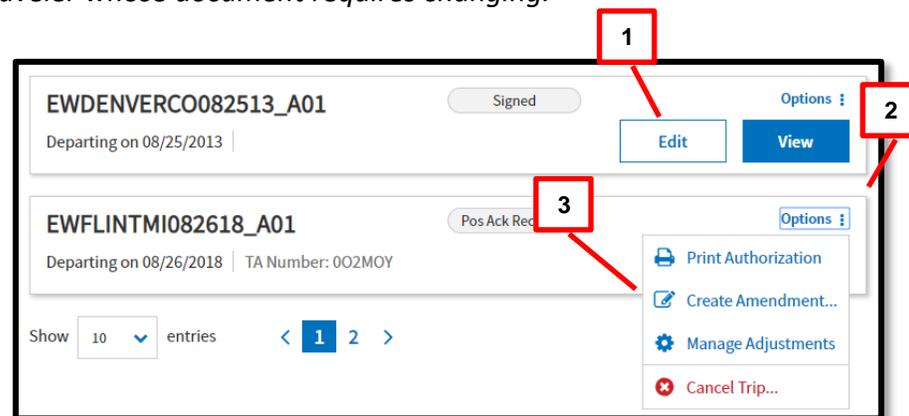


Figure 1: Authorizations Screen

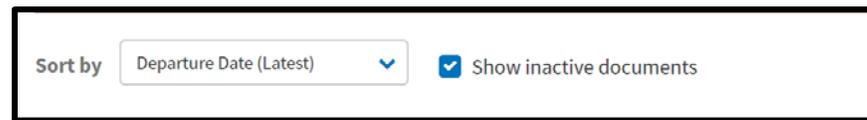


Figure 1a: Show inactive documents Screen

Making an Edit

To edit a document you never signed (i.e., in a **CREATED** status), select **Edit** (Figure 1, Indicator 1) beside the document that you need to change. The document opens on the **Review Trip** <document type> screen (Figure 2). From here, you can navigate to any DTS screen and make all necessary changes.

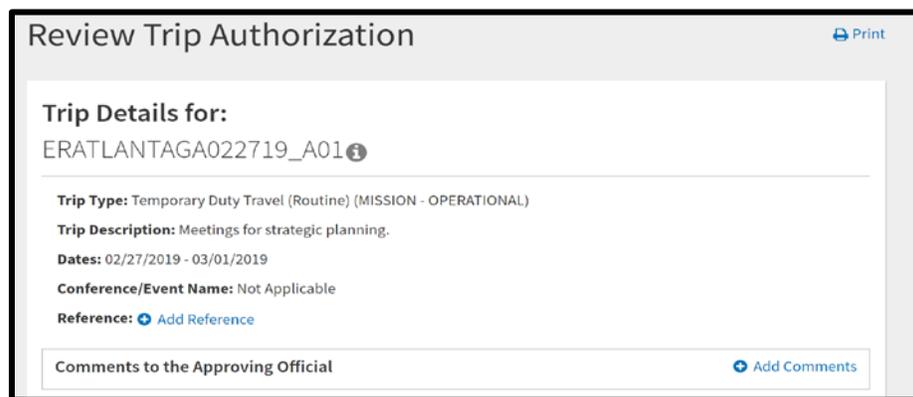


Figure 2: Review Trip Authorization Screen (Top)

Making an Adjustment

To adjust a document you signed, but the AO has not currently **APPROVED** (e.g. **ADJUSTED**):

1. Select **Edit** (Figure 1, Indicator 1) beside the document that you need to change. A pop-up (Figure 3) opens to let you know you are making an adjustment.

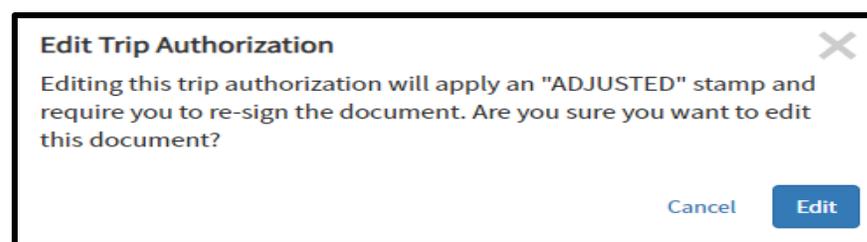


Figure 3: Edit Trip Authorization Pop-up



2. Select **Edit**. The document opens on the **Review Trip** <document type> screen (Figure 2) opens. From there, you can navigate to any DTS screen and make all necessary changes.

Making an Amendment

To amend a document the AO has approved:

1. Select **Options** (Figure 1, Indicator 2) beside the document that you need to change, then **Create Amendment** (Figure 1, Indicator 3). A pop-up opens (Figure 4) to let you enter comments about the reasons for the amendment.

Amend Document

Amending this document will require you to apply another digital signature.

Traveler Name: Eric West

Traveler SSN: ###-##-9743

Amended Document Name: EWFLINTMI082618_A01-01

Comments: 1900 characters remaining

Cancel Amend Document

Figure 4: Amend Document Pop-up

2. Enter a clear comment to explain what you are changing and why, then select **Amend Document**. The document opens on the **Review Trip** <document type> screen (Figure 2) opens. From there, you can navigate to any DTS screen and make all necessary changes.

Wrapping Up

Changing a document may trigger new *Other Authorizations* and *Pre-audit* flags. You must provide comments and justifications (and possibly reason codes) for them, before you can digitally sign the document.

You must visit the **Other Auths and Pre Audits** screen before you may sign the document. After you sign it, DTS routes the trip for approval.

More information about making entries on and changes to DTS screens is available in [DTS Guide 2: Authorizations](#) and [DTS Guide 3: Vouchers](#).