



How to Change the Location on an Expense Report

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Magellan
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How to Query Previous Expense Reports

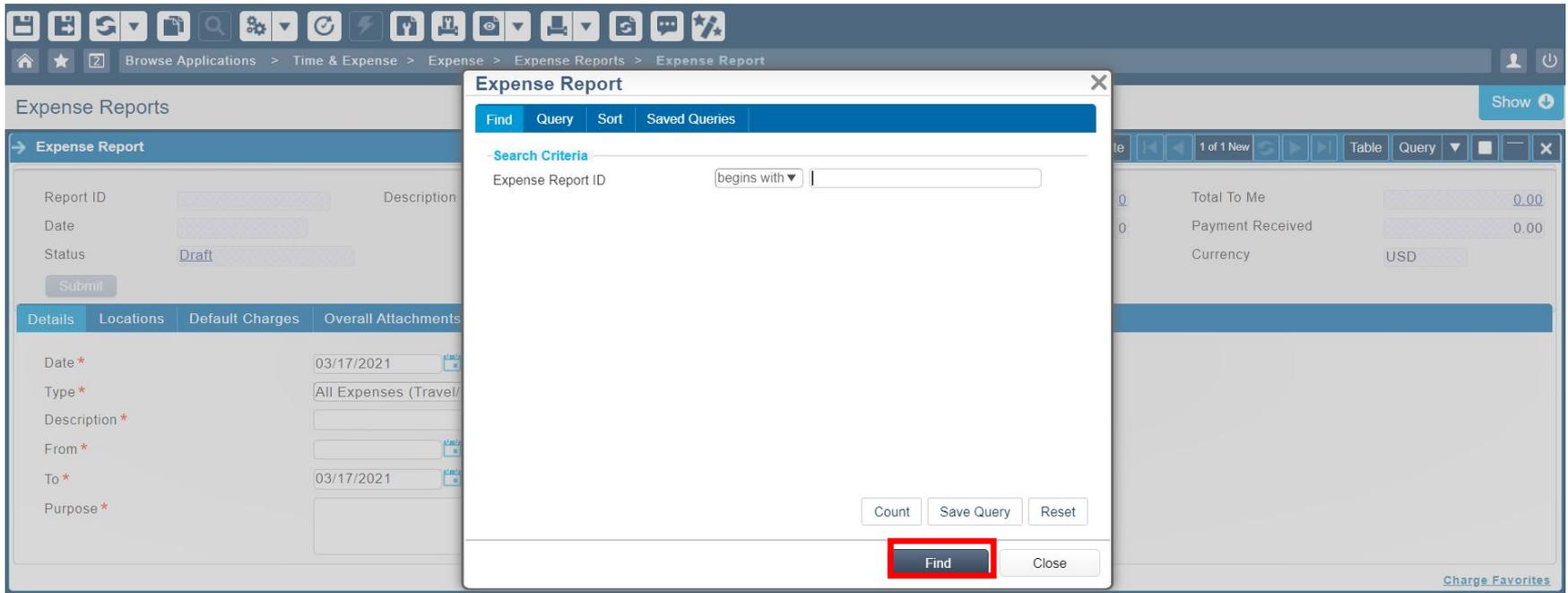


How to Query Previous Expense Reports

The screenshot displays the 'Manage Expense Report' interface. At the top, there is a navigation bar with the breadcrumb 'Browse Applications > Time & Expense > Expense > Expense Reports > Manage Expense Report'. Below this, a toolbar contains several icons and buttons, including 'New Expense Report', 'Delete', and a 'Query' button which is highlighted with a red box. The main form area is divided into two sections. The top section contains fields for 'Report ID', 'Description', 'Revision' (0), 'Total To Me' (0.00), 'Date', 'Correction' (0), 'Payment Received' (0.00), 'Status' (Draft), and 'Currency' (USD). A 'Submit' button is located below these fields. The bottom section is titled 'Purpose' and contains fields for 'Date*' (12/01/2020), 'Type*' (All Expenses (Travel/Non Trvl)), 'Description*', 'From*' (with a 'First Day of Trip' checkbox checked), 'To*' (12/01/2020, with a 'Last Day of Trip' checkbox checked), and 'Purpose*'. The 'Query' button in the toolbar is the key element for finding previous reports.

- To find previous expense reports click “query”

How to Query



- Once you click on the query box a pop-up will come up stating you have unsaved changes, click okay
- When the query box pops-up click find

How to Query

FILE LINE OPTIONS PROCESS HELP

MAGELLAN FEDERAL (MAGELLANHEALTHCONFIG) > Deltek Costpoint >

Browse Applications > Time & Expense > Expense > Expense Reports > Manage Expense Report

Manage Expense Report New Expense Report Delete Form Query

Expense Report ID	Description *	Date *	Revision	Status	From *	To *	Purpose *	Correction	First Day of Trip	Last Day of Trip
ER00060125	August-Sept-October Phone Bill	11/30/2020	0	Approved	08/01/2020	10/31/2020	Aug- Sept- Oct Phone	0	✓	✓
ER00059584	Test 3	09/17/2020	1	Voided	08/24/2020	08/28/2020	test	0	✓	✓
ER00059583	Test 2	09/17/2020	1	Voided	09/07/2020	09/11/2020	test ER	0	✓	✓
ER00059582	Test 1	09/17/2020	2	Voided	09/07/2020	09/11/2020	Test 1	0	✓	✓
ER00059466	June July Cell phone	09/01/2020	0	Processed	06/01/2020	07/31/2020	June and July cell phone	0	✓	✓

- You will then see the list of your reports
- Click on the report you would like to edit or review and click the “form” button at the top right

[How to Change the Location]



How to Change the Location

- In the Claimed Expenses Section, use the Delete button to remove all expenses that would include a location
 - This includes lodging and per diem meals



The screenshot shows the 'Expenses' section of a software interface. The top navigation bar includes 'Expenses', 'Add Claimed Expense', and 'Delete' (highlighted with a red box). Below the navigation bar, there are input fields for Report ID (ER00060244), Description (TEST), Report Start (12/07/2020), Report End (12/09/2020), Expense ID (1), Expense Type (Lodging), Expense Date (12/09/2020), and Expense Amount (340.00). The interface also has tabs for 'Expense Details', 'Room Rates', and 'Expense Amount'.

- Once you have clicked Delete for an Expense a Red X will appear next to it.



The screenshot shows the 'Expenses' section of a software interface after a delete action. The 'Expenses' header now has a red X next to it. The 'Undelete' button is highlighted with a red box. The input fields and tabs are the same as in the previous screenshot.

- If an expense was erroneously deleted *prior* to saving the expense report, use the Undelete button
- Click the Save and Continue button in the upper left corner of the screen

How to Change the Location

The screenshot shows a software interface with a blue header bar containing tabs: 'Purpose', 'Locations', 'Default Charges', and 'Overall Attachments'. The 'Locations' tab is highlighted with a red box. Below the tabs are buttons for 'Add Location' (highlighted with a red box) and 'Delete'. There are also buttons for 'Add To Favorites' and 'Delete Favorites'. Below these is a table with the following columns: 'Location', 'Per Diem Rates', 'Start Date *', 'End Date *', and 'Comment'. The table contains two rows: 'ARLINGTON, VIRGINIA' and 'SAN DIEGO, CALIFORNIA'. The 'SAN DIEGO, CALIFORNIA' row is highlighted in light blue. The 'Start Date' and 'End Date' for both rows are '12/07/2020' and '12/09/2020' respectively, with calendar icons next to them.

<input checked="" type="checkbox"/>	Location	Per Diem Rates	Start Date *	End Date *	Comment
	ARLINGTON, VIRGINIA	View	12/07/2020	12/09/2020	
	SAN DIEGO, CALIFORNIA	View	12/07/2020	12/09/2020	

- Click on the Locations tab at the top of the report
- Use the Add Location button to add the correct location. At this point, do NOT change the dates
- Save and continue the report

Changing a Location on Expense Reports

	Location	Per Diem Rates	Start Date *	End Date *	Comment
<input checked="" type="checkbox"/>	ARLINGTON_VIRGINIA	View	12/07/2020	12/09/2020	
<input type="checkbox"/>	SAN DIEGO_CALIFORNIA	View	12/07/2020	12/09/2020	

- Change the dates of the correct location to reflect the dates of the whole trip
- Highlight the incorrect location and use the Delete button to remove the location.
 - A red “x” will be next to the deleted location
- Save and continue the report by clicking the button in the upper left corner
- Return to Claimed Expenses and re-enter previously deleted expenses
- Click save and continue in the upper left corner
- Submit the report



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