Overview

- Cash Advance requests can be submitted in advance of travel when travel meets the definition of group travel and no alternate mean of payment exists.
- Documentation of the amount and purpose for the request is required information when submitting a Cash Advance request.
- Cash Advance requests can be saved and stored as “In Progress” to be submitted at later dates.
- A submitted Cash Advance request can be withdrawn after it is submitted while it is still pending approval.
- After being withdrawn, the Cash Advance request can be deleted, edited and re-submitted, or saved and kept as “In Progress”.
- If items advance is unused, it needs to be returned within 60 days via deposit using the Misc. AR function.
- Care should be taken to ensure an advance is not being returned before expenses have cleared, and the advance return should be processed before any additional expense reports from unrelated trips are submitted.
I. Navigating to the Self-Service Module

1. You can access the **Expense Module** in two ways:
   a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.
   b. (Option 1) Under the **Me** section, click the drop down arrow, and select **Expenses** from the drop down list.
c. (Option 2) Under the **Me** heading on the home page, you can scroll down and click on the **Expenses** tile on the Main Page.
2. **Create a Cash Advance Request**

1. Upon entering the **Expenses** tile, click the **Actions** icon (top right side of screen.)

2. Select **Request Cash Advance**
3. Enter the following (All fields are required on cash advances)

![Request Cash Advance Form](image)

- **Advance Amount** – Enter the requested amount in U.S dollars.
- **Purpose** – Write in the purpose for the cash advance.
- **Advance Type** – Select travel or other.
- **Trip Start Date** – Select the date that the cash advance is needed from the calendar.
- **Trip End Date** – Select the date that the cash advance is needed from the calendar.
- **Attachment** – Click on attachment icon “+” to attach a completed Travel Advance Form. The form must be attached (link is located below under Policy Link).
- **Location** – List the location where the travel/event will take place.
- **Policy Link** – Copy the URL into a new tab and attach the form to the request.
4. If you are ready to submit your **Cash Advance Request**, click the **Submit** button in the top right corner of the screen. If you are not yet ready to submit, you can also save and submit later.

5. If you would like to save your request to submit later, click on the “**Save**” drop down in the top right corner of the screen and select “**Save and Close**”.

6. To submit a saved Cash Advance Request, click the **In progress** link under the **Cash Advances Tile**.
7. Click the **Cash Advance** number to open it.

8. The request can be edited before submitting. To submit, click the **Submit** button in the top right corner.

### 3. Manage/Withdraw a Cash Advance Request

1. To withdraw a **Cash Advance** request after submission, click on the **In Approval** link inside the **Cash Advances Tile**.
2. Find the **Cash Advance** number and highlight the row by clicking the **Cash Advance** request line (white next to the text). Do not click on the blue **Cash Advance** number.

![Image of BU ignite SIT interface with Travel and Expenses tab open, showing Cash Advance request with number ADVEXP023943685 - Test, trip starts 01/01/2020, and 1.00 USD]](image3)

3. In this step you will withdraw the **Cash Advance** request. Click on the “**Actions**” drop down on the left of the screen and click “**Withdraw**”.

![Image of the Actions dropdown menu with Withdraw and Duplicate options selected](image4)
Expenses: Creating and Managing a Cash Advance Request

4. You now have the option to edit and resubmit the Cash Advance request by clicking on the cash advance number.

5. If the request needs to be deleted, click the “X” on the lower right side of the Cash Advance request row.