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- A Cash Advance request can be withdrawn after it is submitted, while it is still pending approval.
  - After being withdrawn, the Cash Advance request can be deleted, edited, and resubmitted, or saved and kept as “In Progress”.
  - Instructions for withdrawing an advance are at the end of this job aid.
- Unused Cash Advance funds must be returned within 60 days via Miscellaneous Receipt and deposit processed by your Department’s AR Specialist.
- **Timing is critical:**
  - Care should be taken to ensure an advance is **not** returned before the expenses have cleared, and
  - The return of unused Cash Advance funds 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 Cash Advances icon (left side of screen.)

2. Select Request Cash Advance
3. Enter the following (All fields are required on cash advances)
   a. **Advance Amount** – Enter the requested amount in U.S dollars.
   b. **Purpose** – Write in the purpose for the cash advance.
   c. **Advance Type** – Select travel or other.
   d. **Trip Start Date** – Select the date that the cash advance is needed from the calendar.
   e. **Trip End Date** – Select the date that the cash advance is needed from the calendar.
   f. **Attachment** – Click on attachment icon “+” to attach a completed Travel Advance Form. The form must be attached (URL link to form is located adjacent to **Supporting Documentation** field).
   g. **Location** – List the location where the travel/event will take place.
   h. **Supporting Documentation** – Copy the URL address into a new tab and attach the completed Travel Advance 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, navigate to the Cash Advance screen and click the Cash Advance number to open it.

7. The request can be edited before submitting. To submit, click the “Submit” button in the top right corner.
3. **Withdraw a Cash Advance Request** *(only if not approved)*

1. To withdraw a **Cash Advance** request after submission, navigate to the cash advance screen.

2. Find the Cash Advance number and select the row by **clicking the row** (the white next to the text). The row will turn light blue to indicate the row is selected. **Do not open the advance by clicking on the Cash Advance number.**

3. Click on the “**Actions**” drop down on the left of the screen and click “**Withdraw**”.

   a. *Click “**Yes**” when the warning message appears.*

![Withdraw Cash Advance](image-url)
4. Once the request is withdrawn, you can now edit and resubmit the **Cash Advance** request. Open the request by clicking the number, and resubmit.

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